Coupa Talk – Invoice Enhancements

Table of Content

- Supplier template amended to allow fields to be changed e.g. invoice number, amount, VAT code.
- Automatic date removed - supplier will have to complete invoice date manually.

- Editing Disputed Invoices - Allow AP teams to edit supplier invoices & Allow Suppliers to edit disputed invoices.
- Price Disputed Invoices - Supplier Template amended to allow AP to fix the price.
- Same invoice number can be used after credit note issued.
- Total Tax section no longer editable.

- No need to Abandon so many invoices since Suppliers and AP Users can edit supplier invoices & disputed invoices respectively.
- Abandon Function allocated to AP users will reduce credit notes and save processing time.

Coupa Talk – Invoice Example 1

Small changes to take note off when creating an Invoice

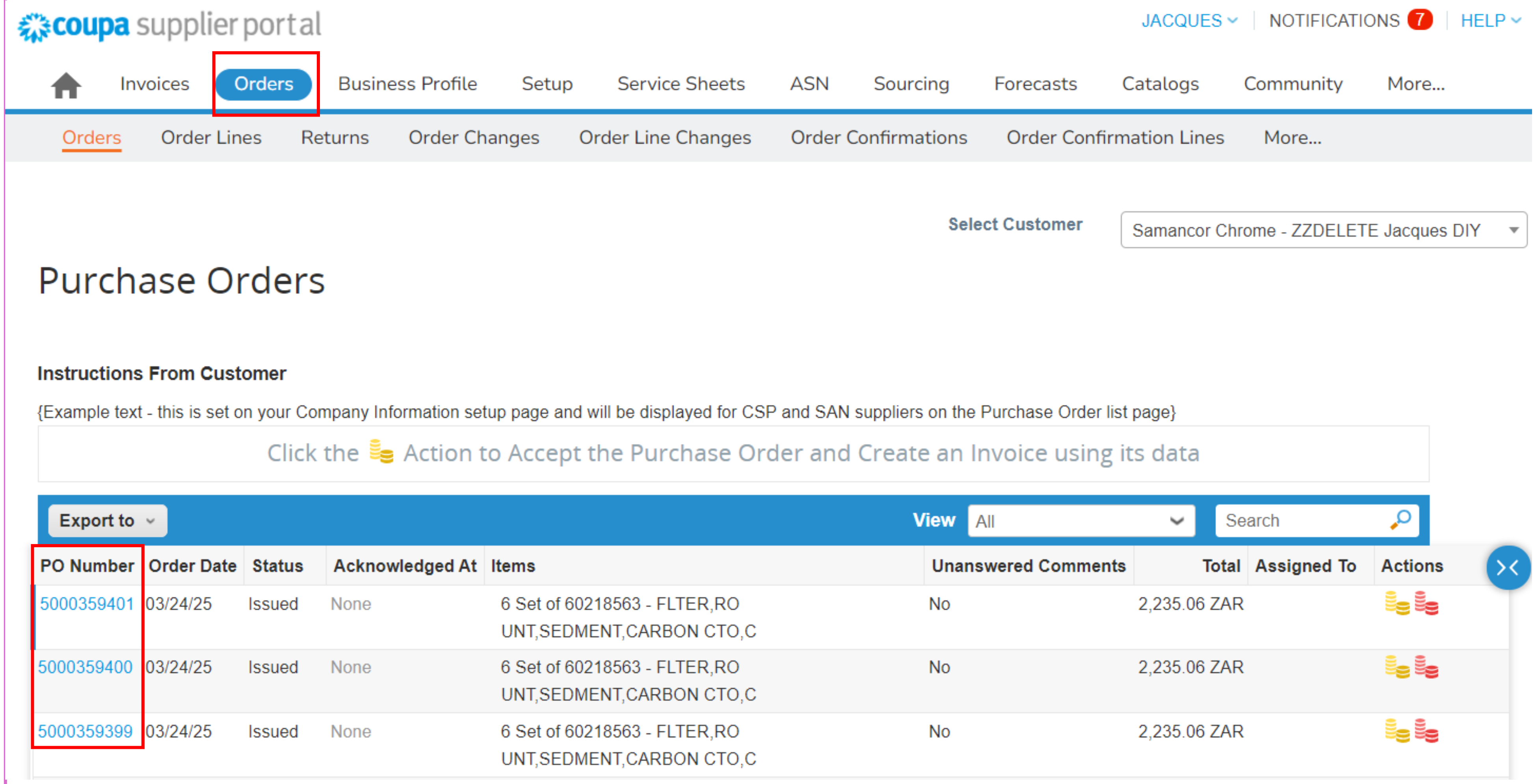
Create an Invoice – No issue on PO Or Invoice
Test: What does Supplier see.

Test changes brought in:

- Supplier template amended to allow fields to be changed eg invoice number, amount, VAT code.
- Automatic date removed - supplier will have to complete invoice date manually.

Supplier Steps

2 As a Supplier, **Open** the **CSP Portal** and find the PO's that need to be invoiced under the **Order Tab**.



Samancor Steps

1 Supplier has received a Purchase Order from Samancor.

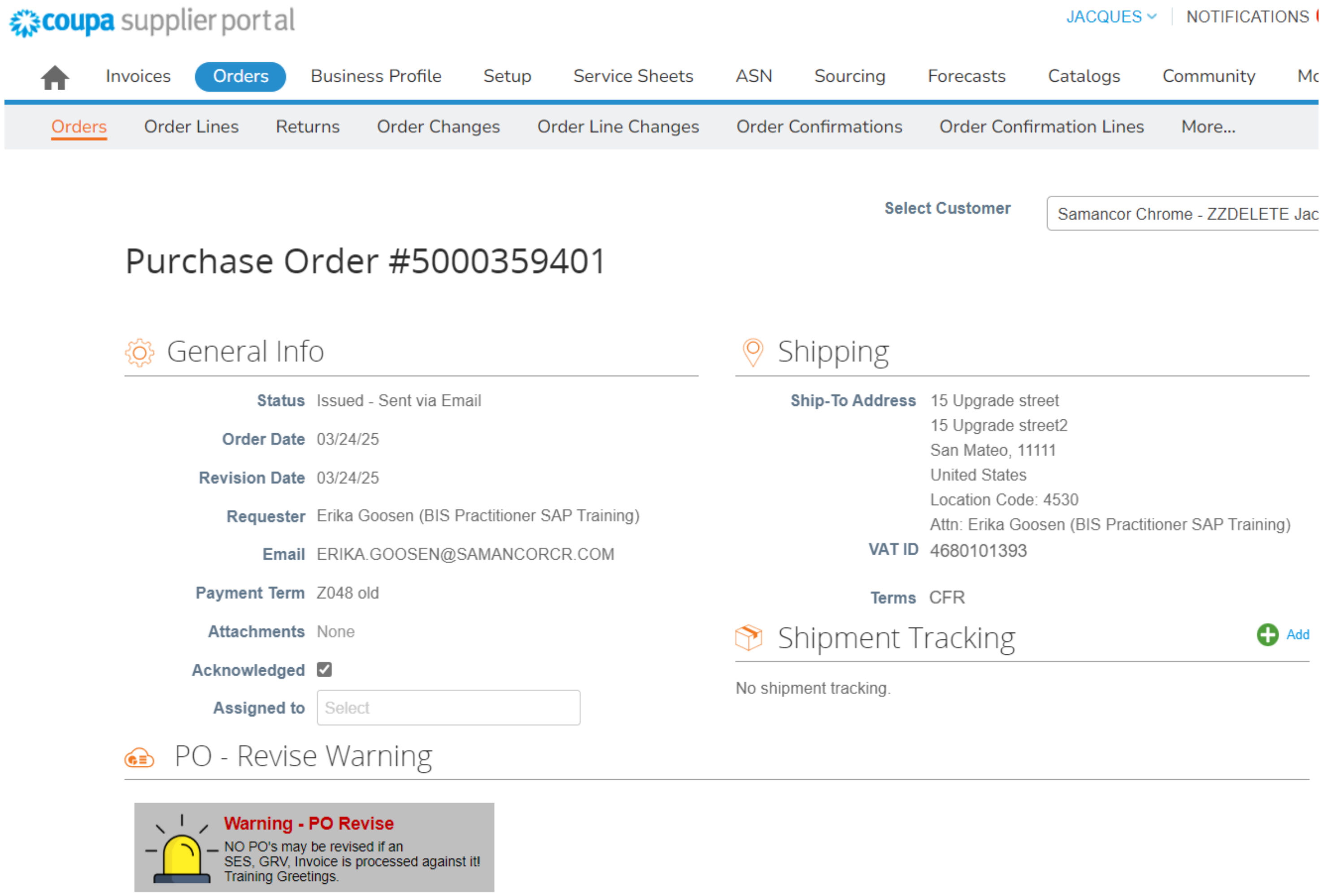
The Items where delivered, the GRV and SES was completed.

The Supplier is ready to complete the Invoice in the Coupa Supplier Portal(CSP).

Supplier Steps

Samancor Steps

3 Open the 1st PO and Inspect. You will see the following information:



Take note of the warning message and ensure the SES has been completed before attempting to complete the invoice.

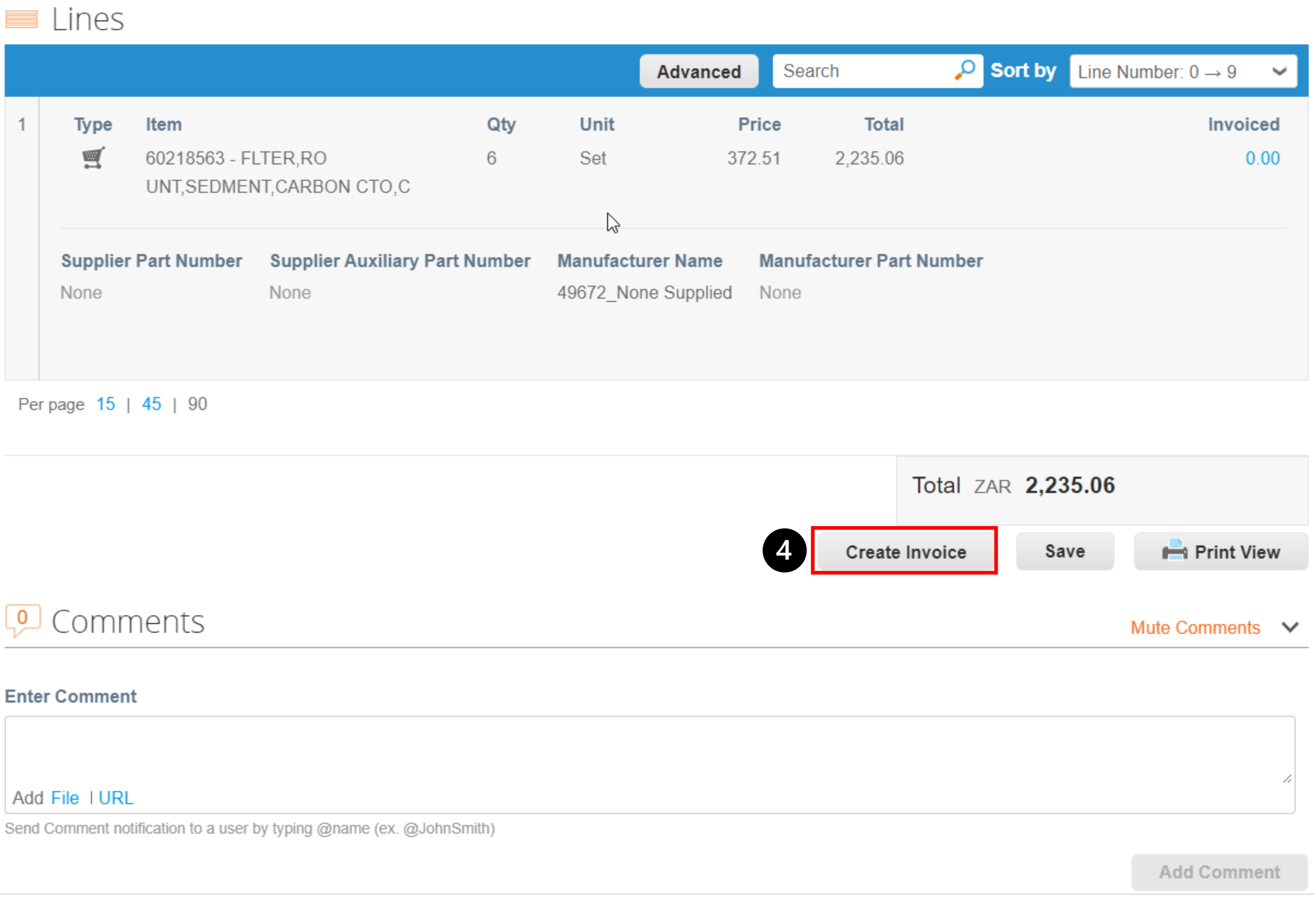
samancor

Supplier Steps

Samancor Steps

The following is visible when inspecting the PO Line.

4 **Click** on the **Create Invoice Button** to start the Invoice Process.



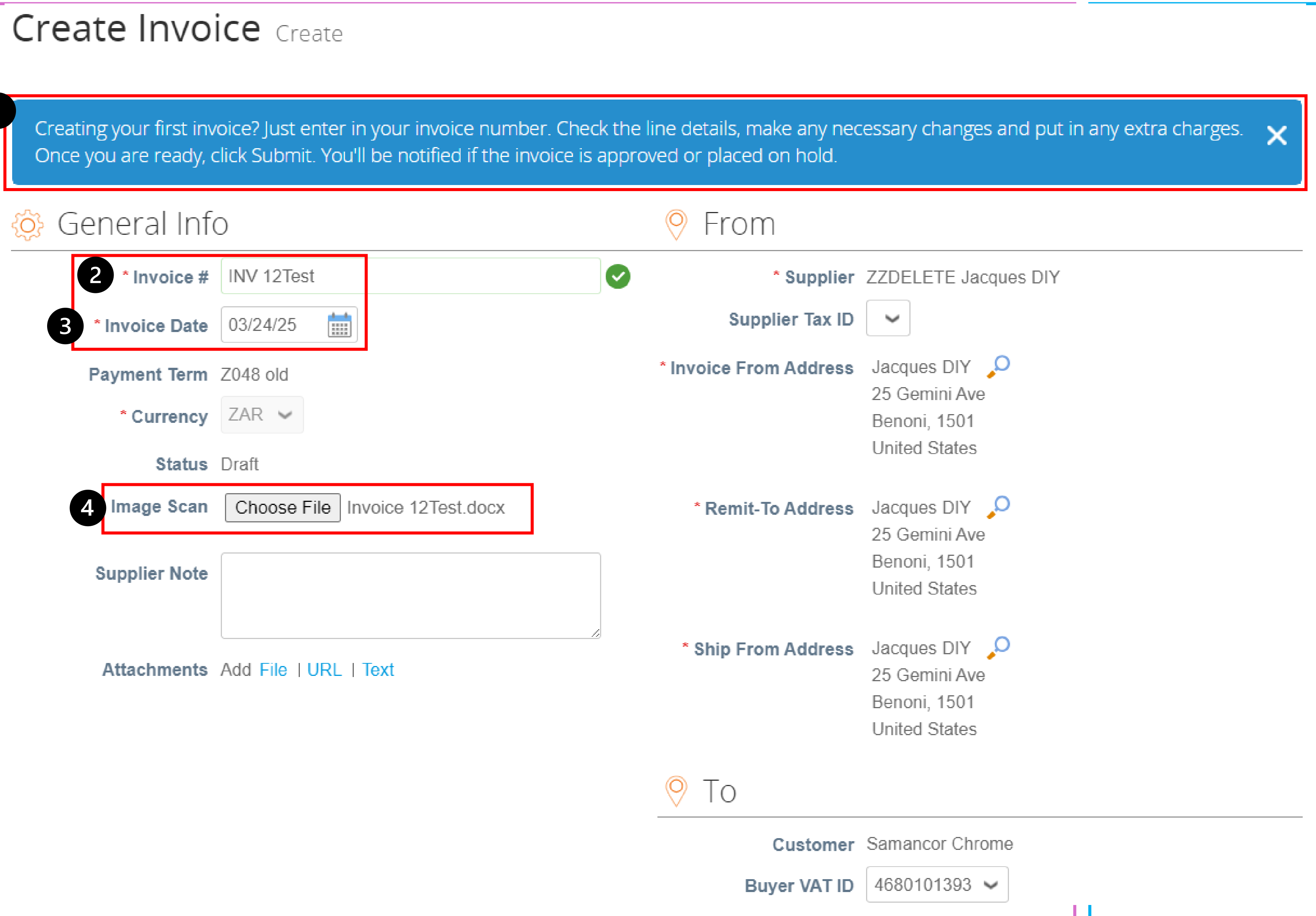
Supplier Steps

Samancor Steps

The create invoice screen is visible.
Take note of the following:

1. Read the Blue message at the top.
2. Insert your companies invoice number
3. Enter the Invoice date – note the date no longer defaults to today's date.
4. Insert a copy of your company invoice in PDF format.

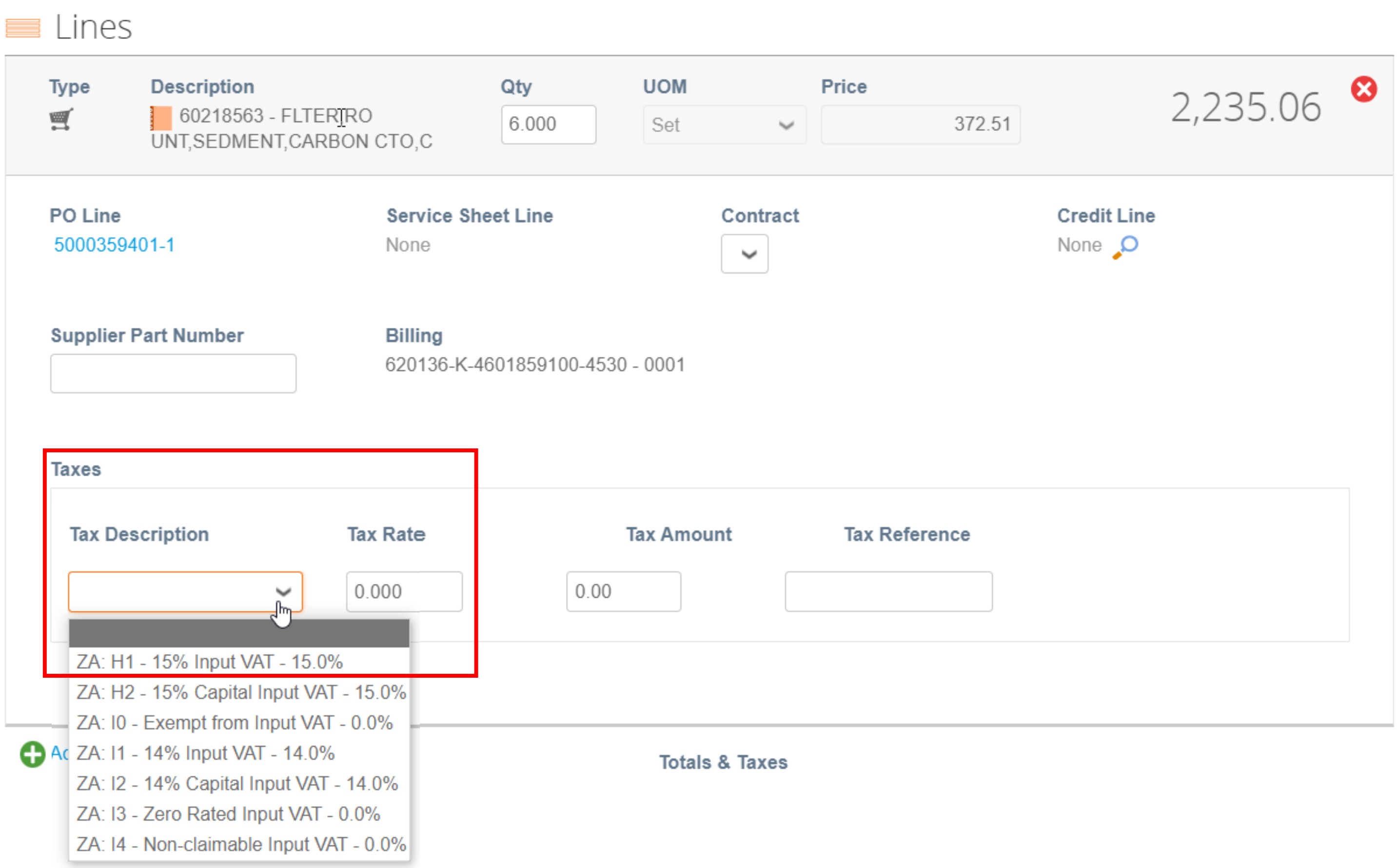
- Note – Invoice and Credit Note Numbers should not exceed 15 characters to prevent integration errors.



Supplier Steps

Samancor Steps

Select the appropriate VAT code from the dropdown list provided. For most items you will select the 1st VAT line.
Note the VAT amount will calculate automatically after you select the TAX code. Do not insert the VAT Value manually since this will result in an integration error.



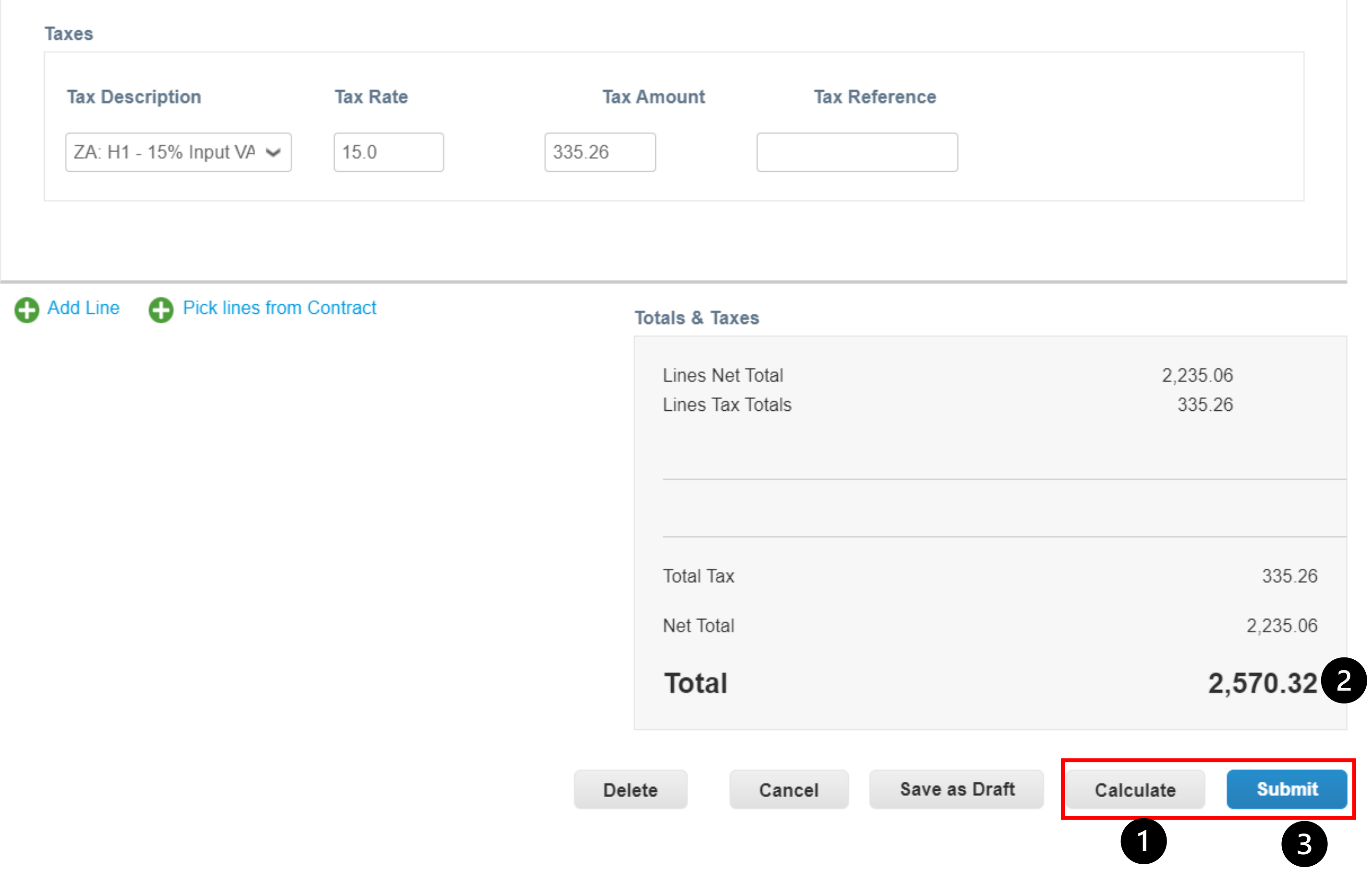
Supplier Steps

Samancor Steps

1 Scroll down further - Click on the **Calculate Button** to calculate the TAX amount automatically.

2 Ensure that the attached Invoice document, and the **Total Amount** displayed below, correlate.

3 Then click on the **Submit Button.**

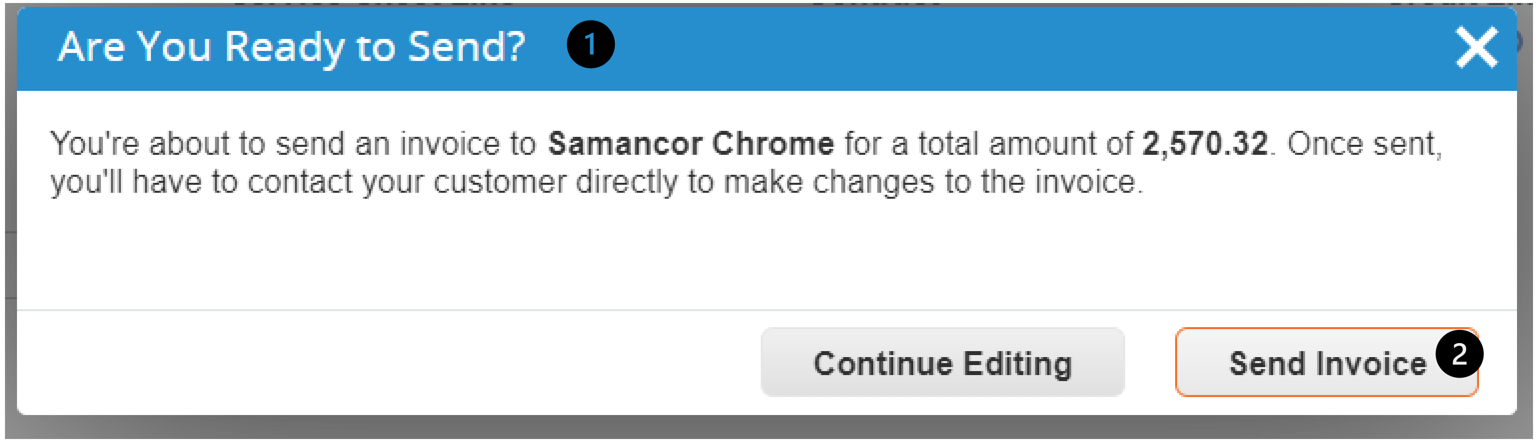


Supplier Steps

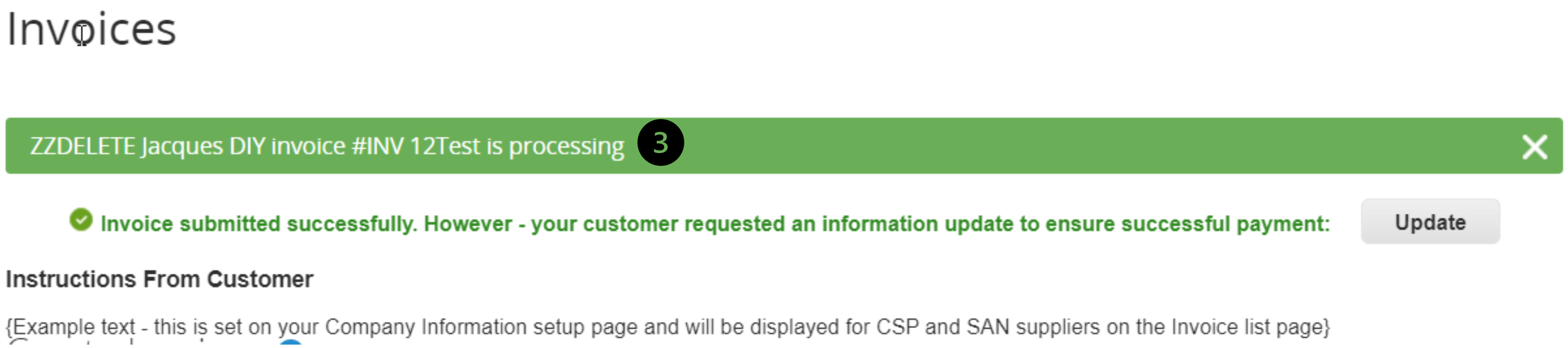
Samancor Steps

1 The following message is displayed.

2 Click on the **Send Invoice Button**



3 The following green message is displayed.



Supplier Steps

Samancor Steps

Switching sides, Act as Neo (AP User Samancor) Erika Goosen (BIS Practitioner SAP Training) acting as NEO BISHOP

Open Coupa and find invoices in AP Hold. Select and Open one of the invoices. I will select invoice number INV12Test.

Requests Orders Invoices Community Inventory Sourcing Suppliers Contracts Reports Setup

Invoices Invoice Lines Invoice Inbox Uninvoiced Orders Accrual Report Insights Legal Invoice

Invoices

Return to classic experience

Views **MFC View**

Create

Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359399	2025/03/25	None
INV 11Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359400	2025/03/24	None
INV 12Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359401	2025/03/24	None

samancor

Supplier Steps

Samancor Steps

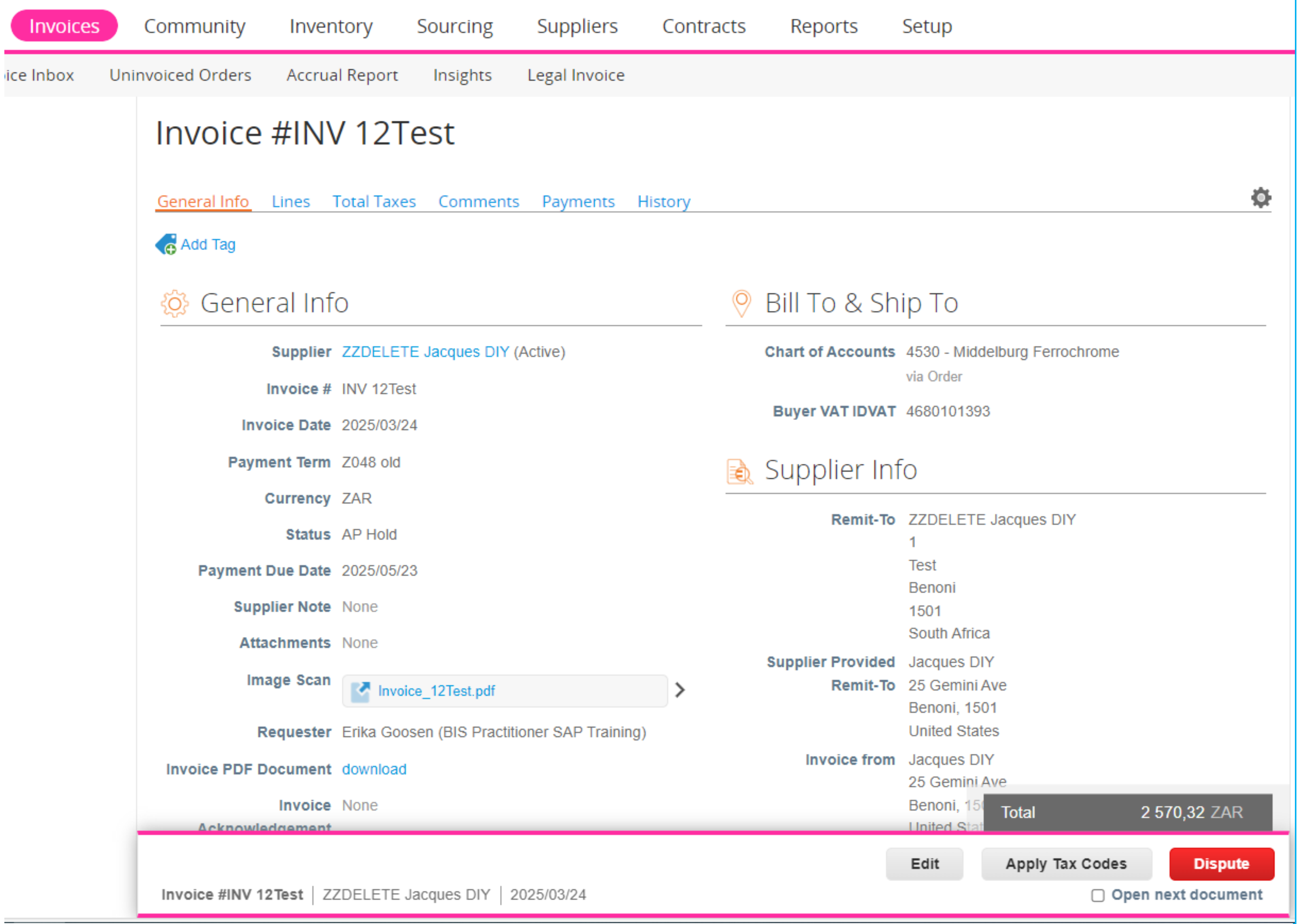
1 **Open Invoice** and inspect.
Invoice is Correct.

Note the following :

- The invoice is not in Edit mode
- If you click on Apply Tax code, the following message is displayed

No new tax codes were applied.

- The **Dispute Button**
- **Click** on **Edit Button**.

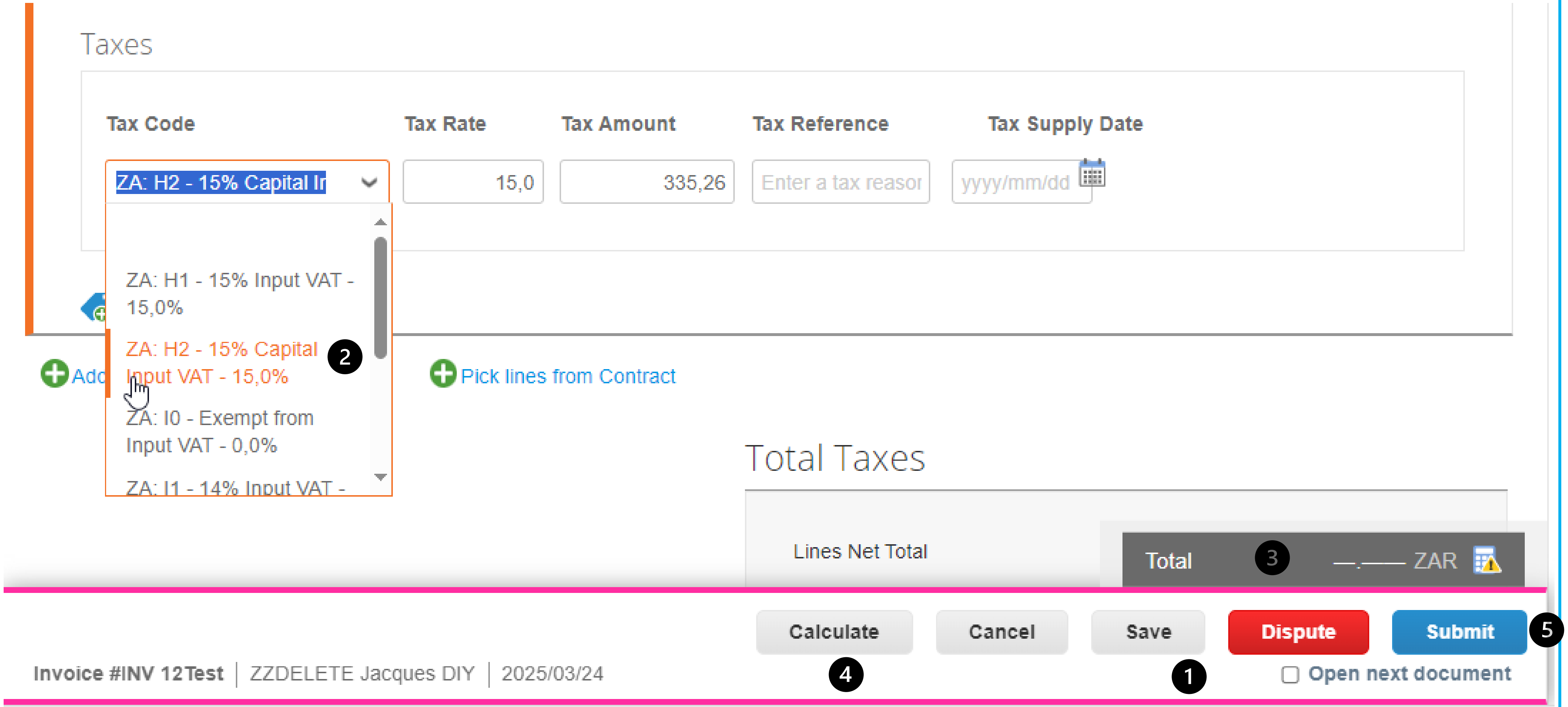


samancor

Supplier Steps	Samancor Steps

1 Action availability Buttons, at the bottom of the screen changes.
2 **Select** to change the **Tax Code** and the
3 **Total** goes blank until you click on the 4 **Calculate Button** again. Click on 5 **Submit.**

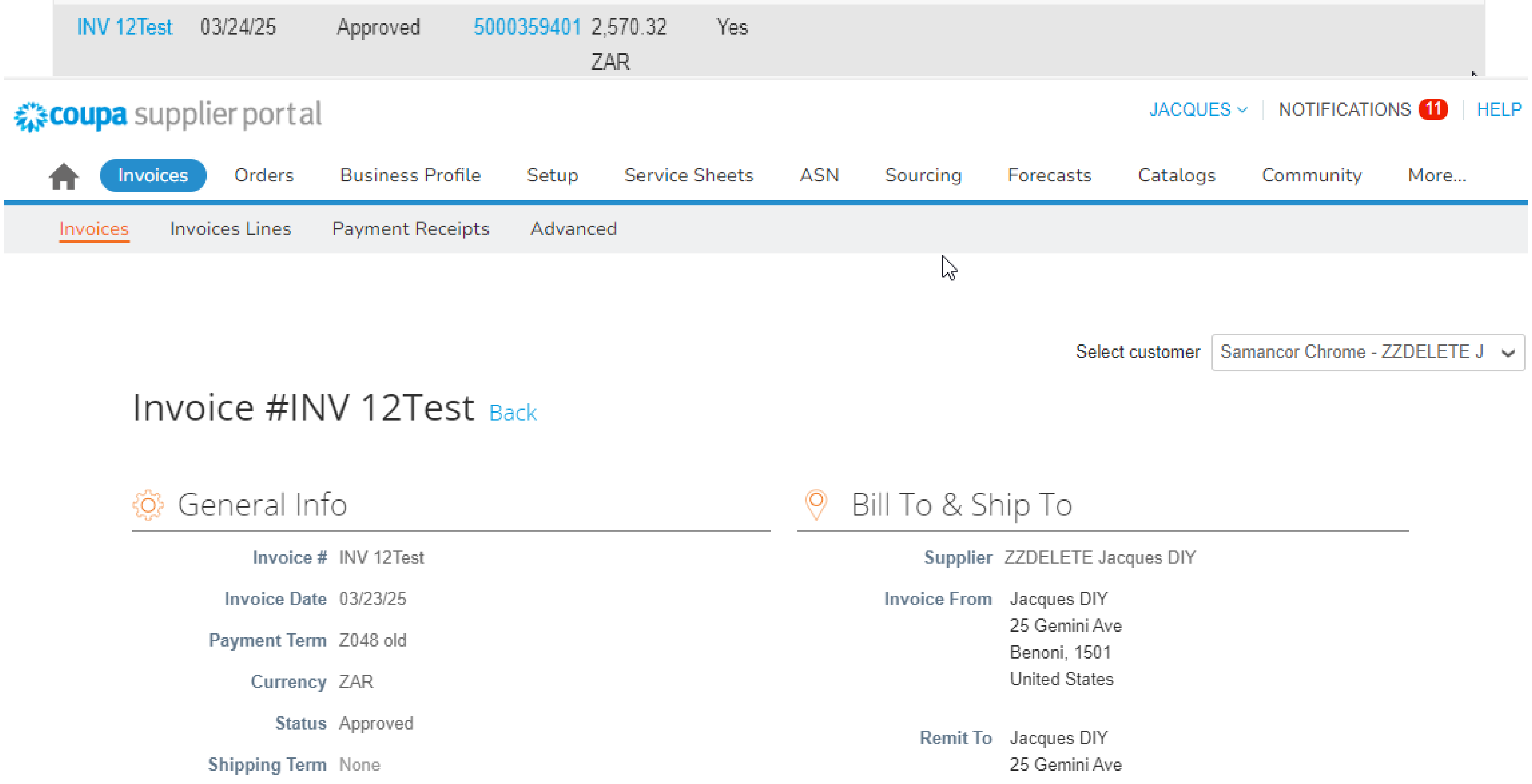
6 The invoice is approved Invoice #INV 12Test is approved.



Supplier Steps

Samancor Steps

On the Supplier Side, once an invoice has been **Approved** no further actions are required and payment will be done as determined by the **Payment Terms.**



Coupa Talk – Invoice Example 2

Dispute an Invoice

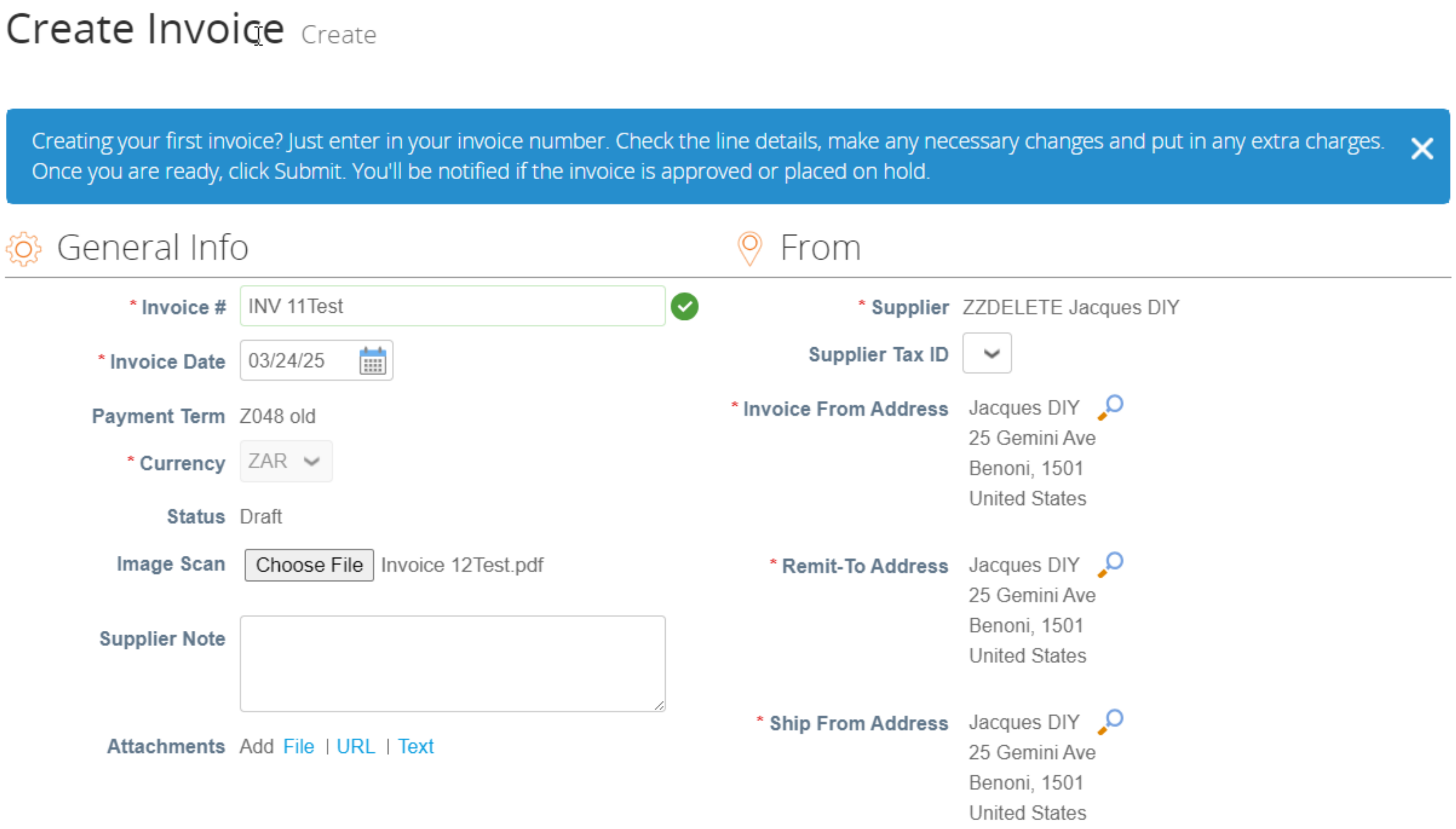
Create an Invoice – Over Invoiced. PO for Qty of 6 -GRV QTY of 5 - and Invoice Qty of 6 - Dispute – Supplier or AP can rectify and submit.
Test: What does Supplier & AP User see.

Test changes brought in:

- Editing Disputed Invoices - Allow AP teams to edit supplier invoices & Allow Suppliers to edit disputed invoices.
- Price Disputed Invoices - Supplier Template amended to allow AP to fix the price.
- Same invoice number can be used after credit note issued.
- Total Tax section no longer editable.

Supplier Steps

2 Second PO Invoiced followed same steps as in 1st Invoice.

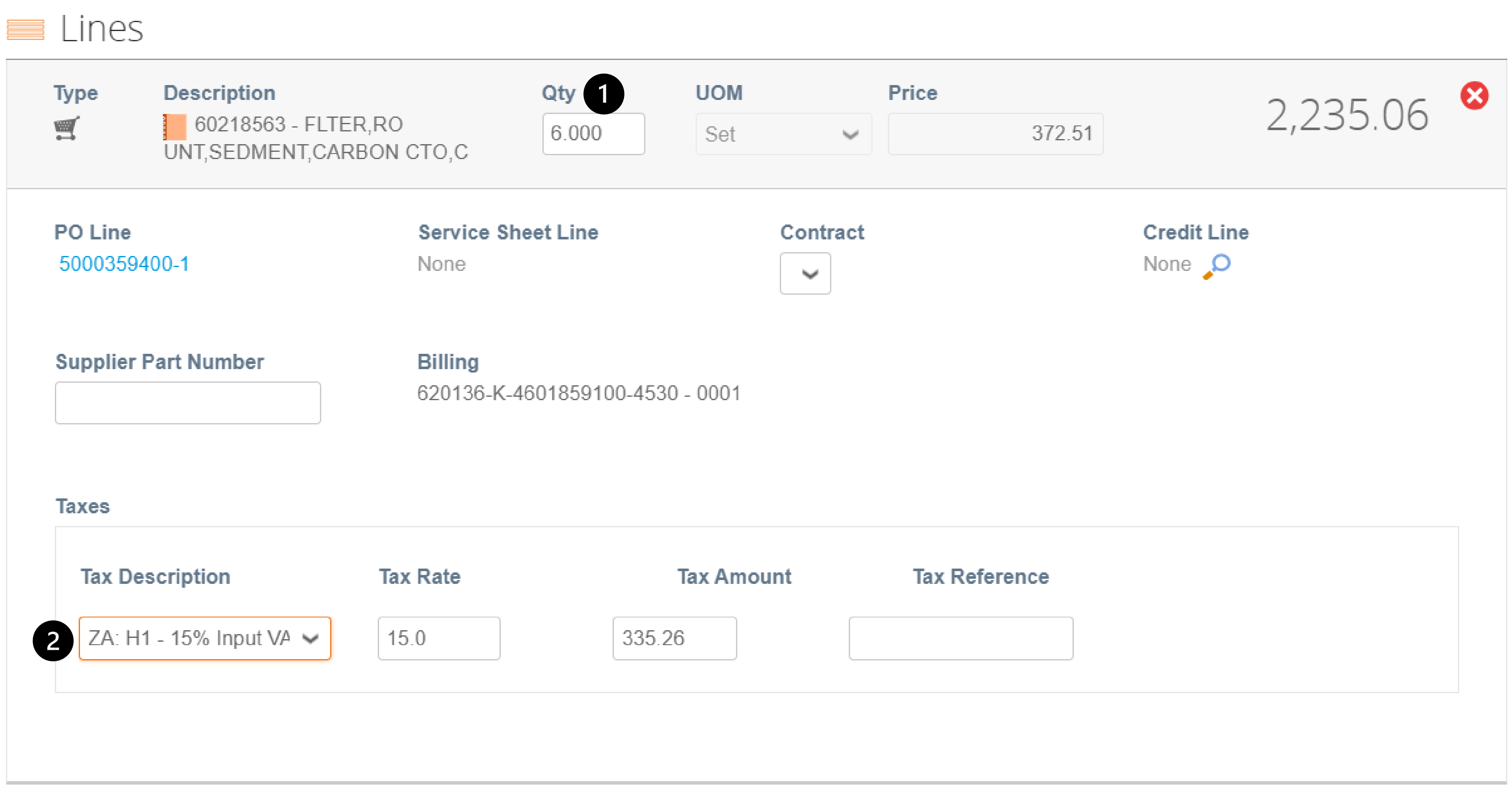


Samancor Steps

1 PO for Qty of 6 -GRV QTY of 5 - and Invoice Qty of 6 - Dispute – Supplier or AP can rectify and submit.

Supplier Steps	Samancor Steps

1 Deliberately Over Invoice – Note, you cannot see on PO that you are busy with over invoicing.
2 Add tax and calculate and submit

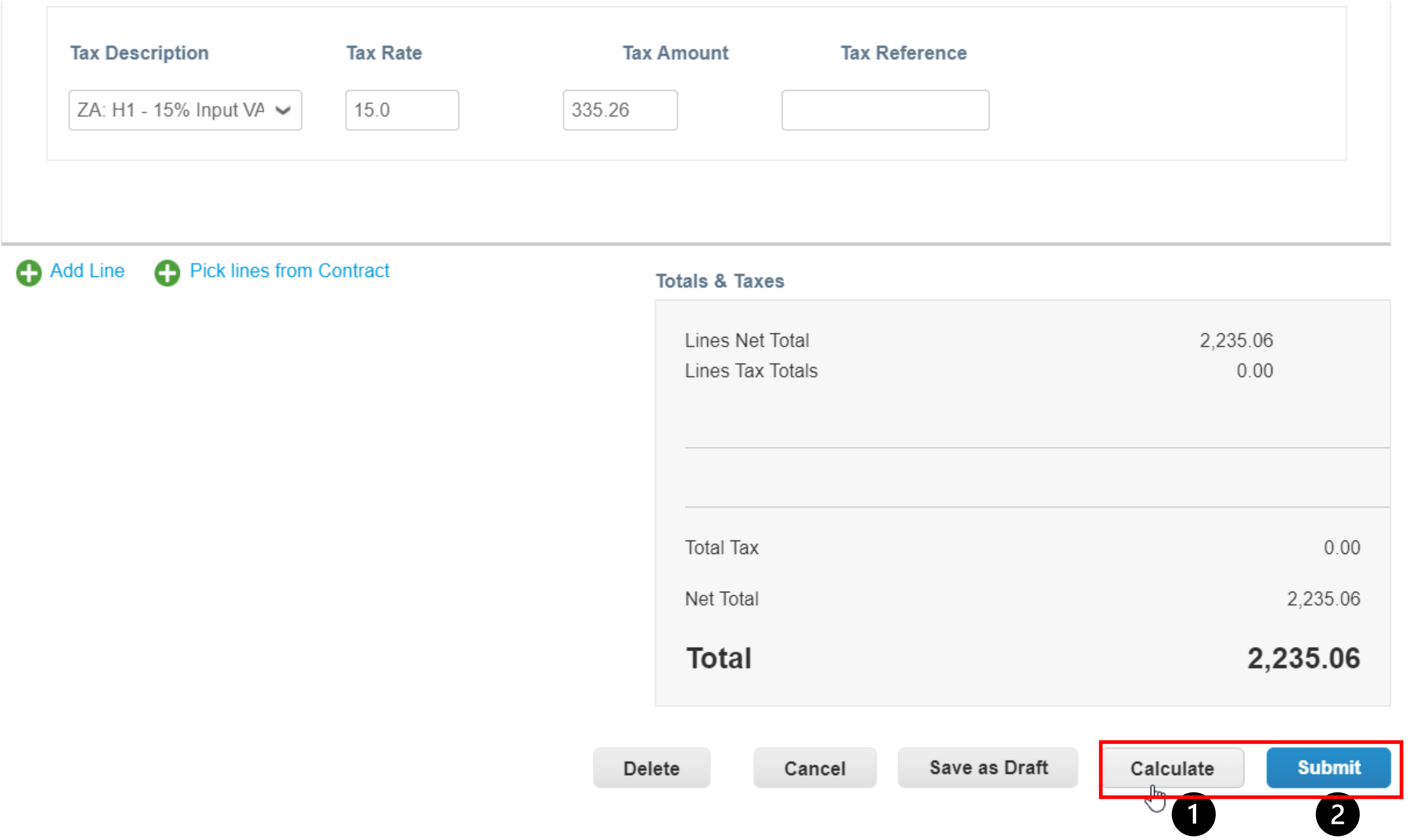


Supplier Steps

Samancor Steps

1. Click on the **Calculate Button** to calculate the TAX amount automatically. Ensure that the attached Invoice document, and the **Total Amount** displayed below, correlate.

2. Then click on the **Submit Button.**



Supplier Steps

Samancor Steps

Receive message are you sure you want to send the Invoice; you select **Send Invoice Button,** and the following green message is displayed.

Invoices

ZZDELETE Jacques DIY invoice #INV 11Test is processing

As a supplier I can see on the **Invoice Tab** that two invoices has been processed – one with a **Pending Approval Status** (needs to be approved by Samancor) and one with a **Processing Status** (invoice needs a second before reflecting in Samancor system).

Create Invoices

Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note

Export to | View: All | Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV 11Test	03/24/25	Processing	5000359400	2,570.32 ZAR	No		
INV 12Test	03/24/25	Pending Approval	5000359401	2,570.32 ZAR	No		

Supplier Steps

Samancor Steps

Switching sides, Act as Neo (AP User Samancor) Erika Goosen (BIS Practitioner SAP Training) acting as NEO BISHOP

Open Coupa and find 3 invoices in AP Hold. Select INV11 Test.

Requests Orders Invoices Community Inventory Sourcing Suppliers Contracts Reports Setup

Invoices Invoice Lines Invoice Inbox Uninvoiced Orders Accrual Report Insights Legal Invoice

Invoices

Return to classic experience

Views **MFC View**

Create

Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359399	2025/03/25	None
INV 11Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359400	2025/03/24	None
INV 12Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359401	2025/03/24	None

Supplier Steps

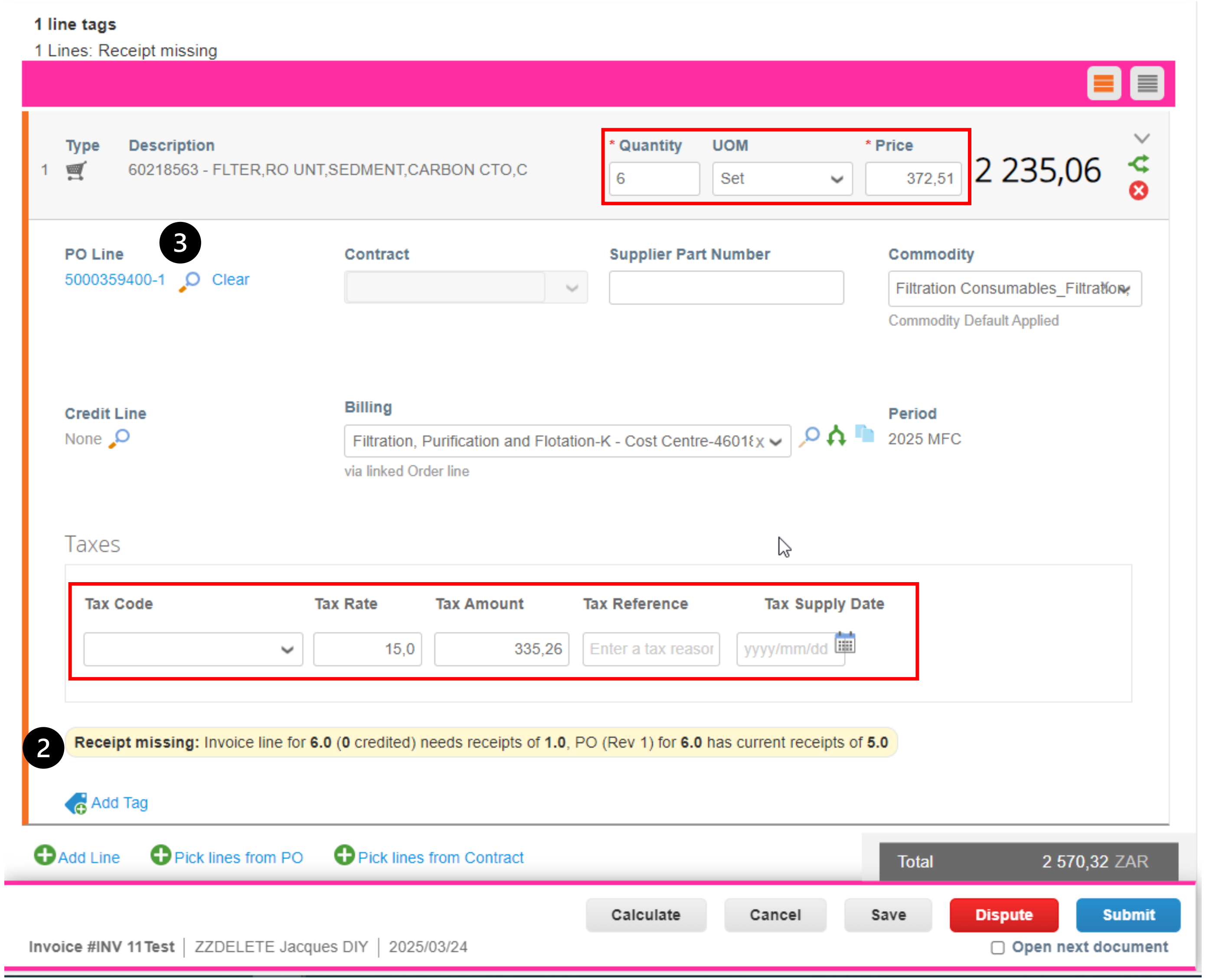
Samancor Steps

1 **Open Invoice** and inspect. Scroll to the **Line Item**.

Note Samancor AP users can now also amend the quantity/ price/ tax code and invoice date if required. This will be verified during approval.

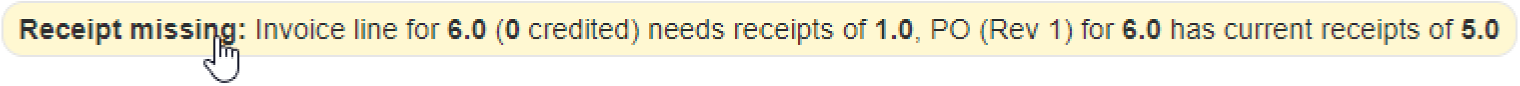
Although AP can fix the invoice quantity and price ,it is recommended that the invoice be disputed to allow the supplier to amend and attach the correct PDF invoice copy .

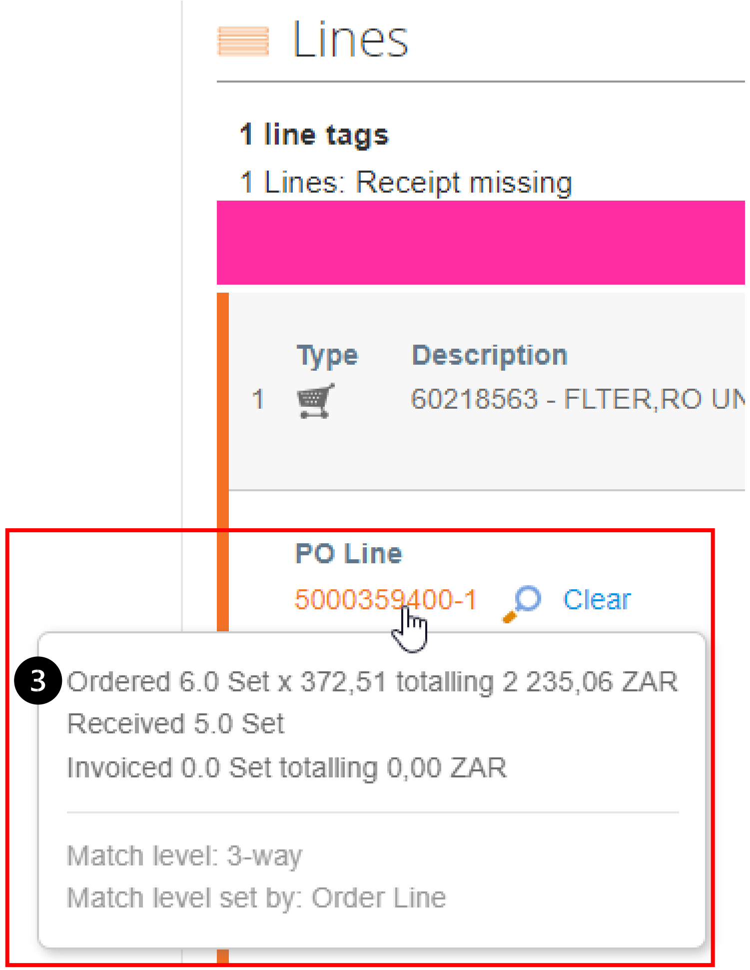
If fixed by AP this will result in audit issues as the attached PDF and processed invoice will not match.



Supplier Steps	Samancor Steps

2 The yellow message indicates that there is still a Receipt Missing.

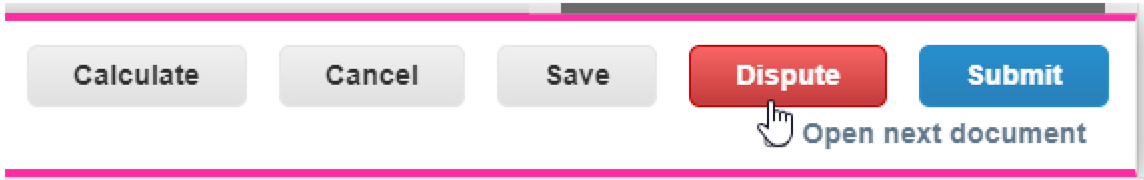




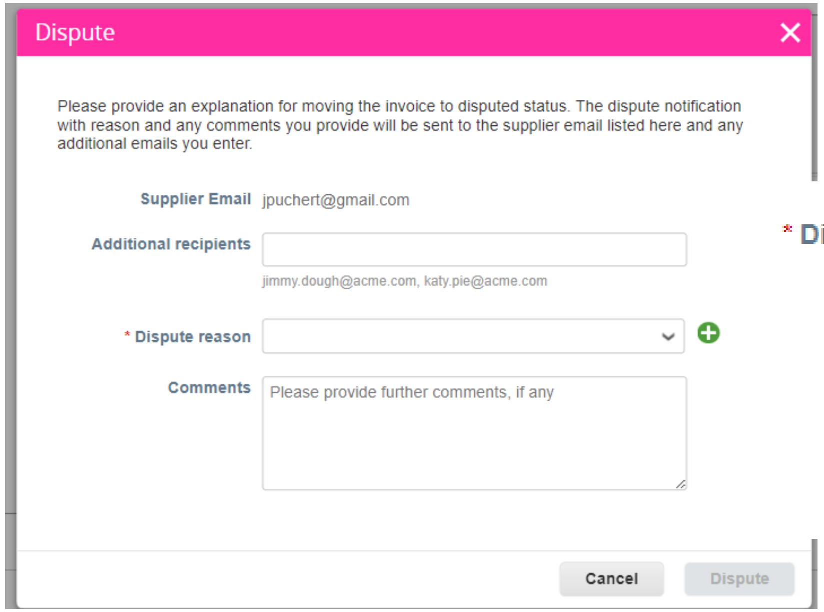
3 When the computer mouse is hovered over the PO number in the basket line, it will indicate what was ordered received and invoiced. This is a case of over invoicing (quantity on invoice is for 6 items and we only received 5). This invoice will then be Disputed by Samancor.

Supplier Steps	Samancor Steps

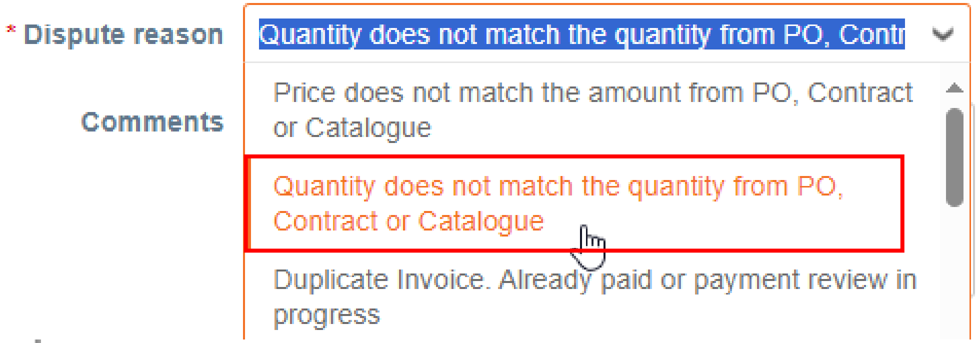
4 At the bottom of the Invoice**, Click** on the **red Dispute Button**.



5 The **Dispute Dialog box** is displayed.



6 Select the Dispute Reason most appropriate to the situation. In this case " Quantity does not match the quantity from PO, Contract or Catalogue". You can scroll down for more options.

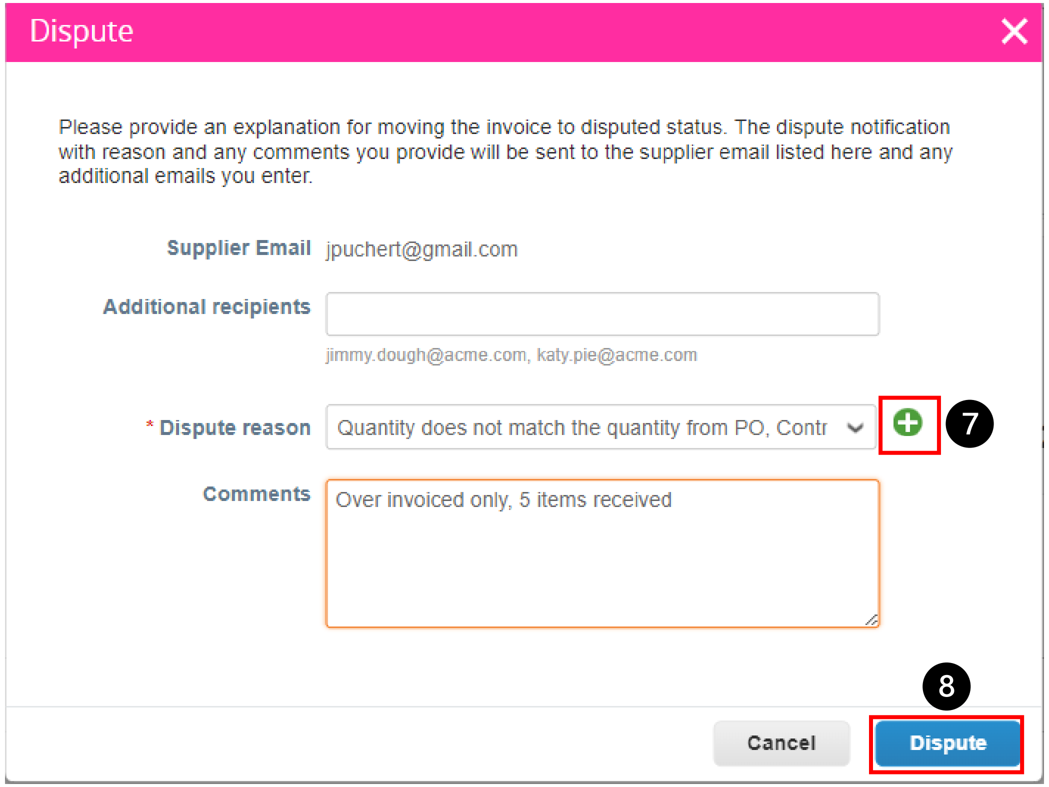


Supplier Steps

Samancor Steps

7 Note the green Plus next to the Dispute Reason.
You can add more than one Dispute Reason to the dispute.

8 Once the Dispute Reason and Comment is completed**, Click** on the **Dispute Button**.

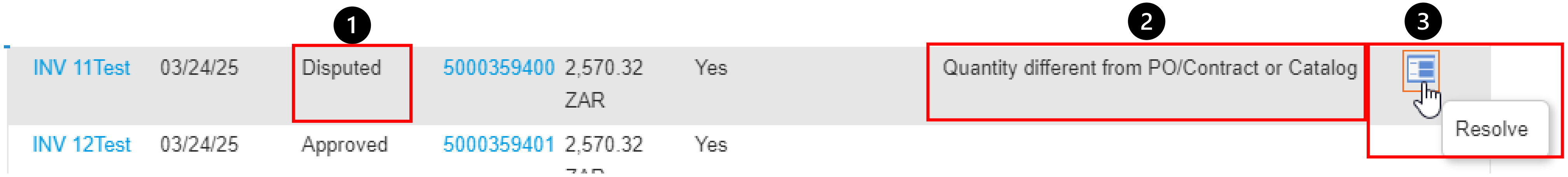


9 A green message is displayed confirming the Invoice has been Disputed.

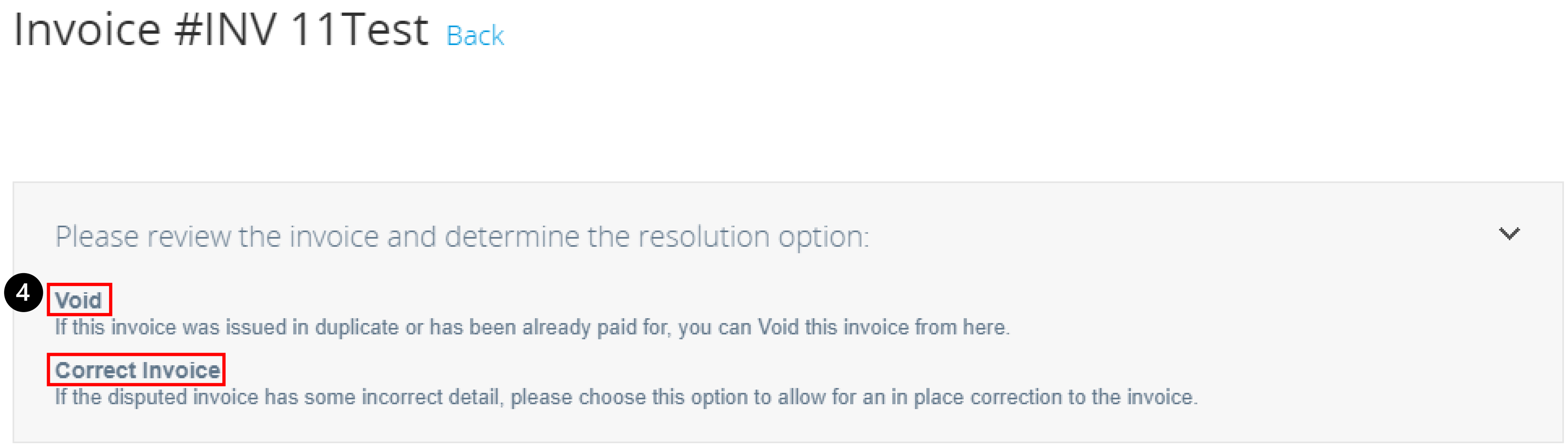
Supplier Steps

Samancor Steps

Back as a Supplier, Open the CSP Portal and note the **Status** 1 and **Dispute Reason in the Dispute Reason Column** 2.
There is also a new Icon in the **Action Column** – the **Resolve Icon**. 3



3 **Click** on the **Resolve Icon**.
4 The Invoice opens, and a clear description is given of **Void** and **Correct Invoice**.

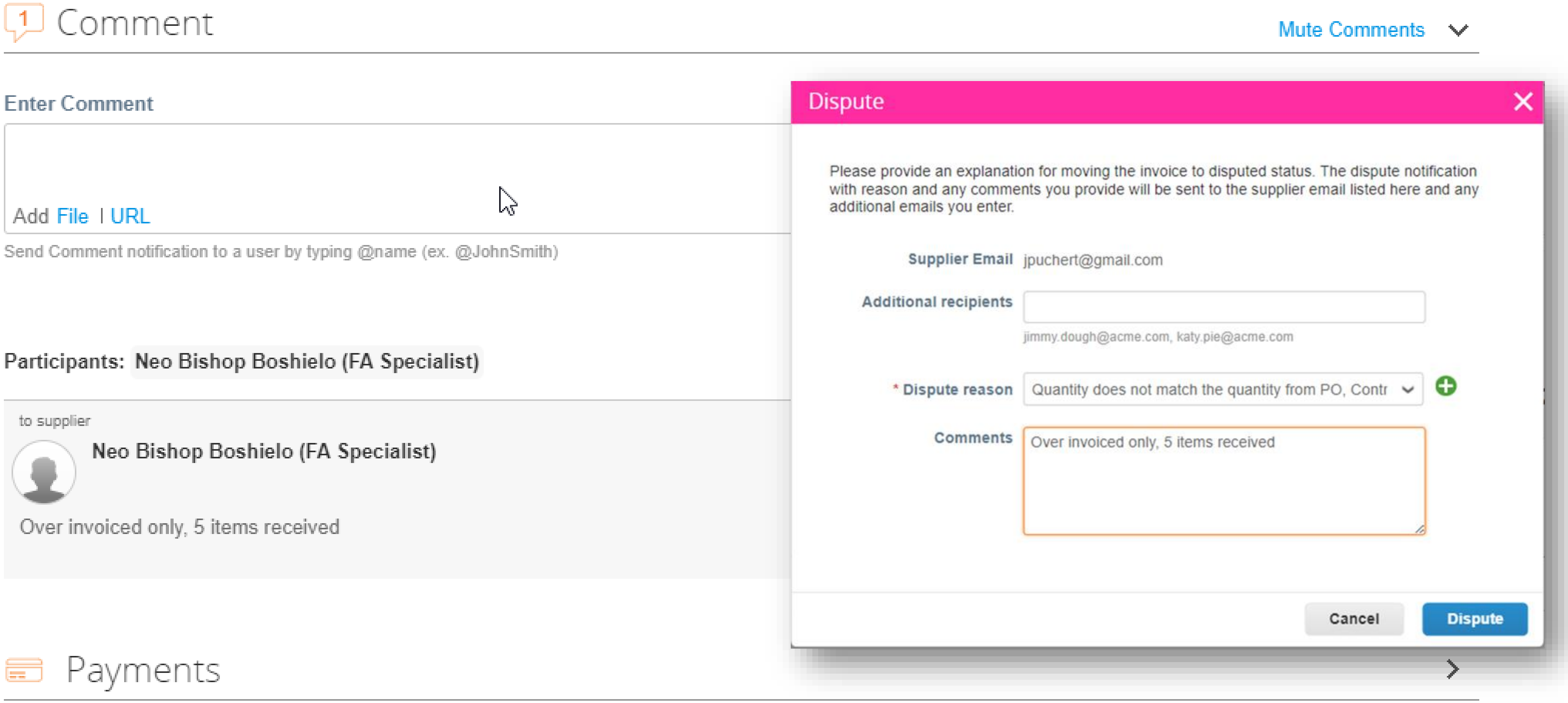


Supplier Steps

Samancor Steps

At the bottom of the Invoice, are two Buttons- Void and Correct Invoice.

Also take note of the comment at the bottom of the Invoice.
It corresponds with the Dispute Comments made by AP.

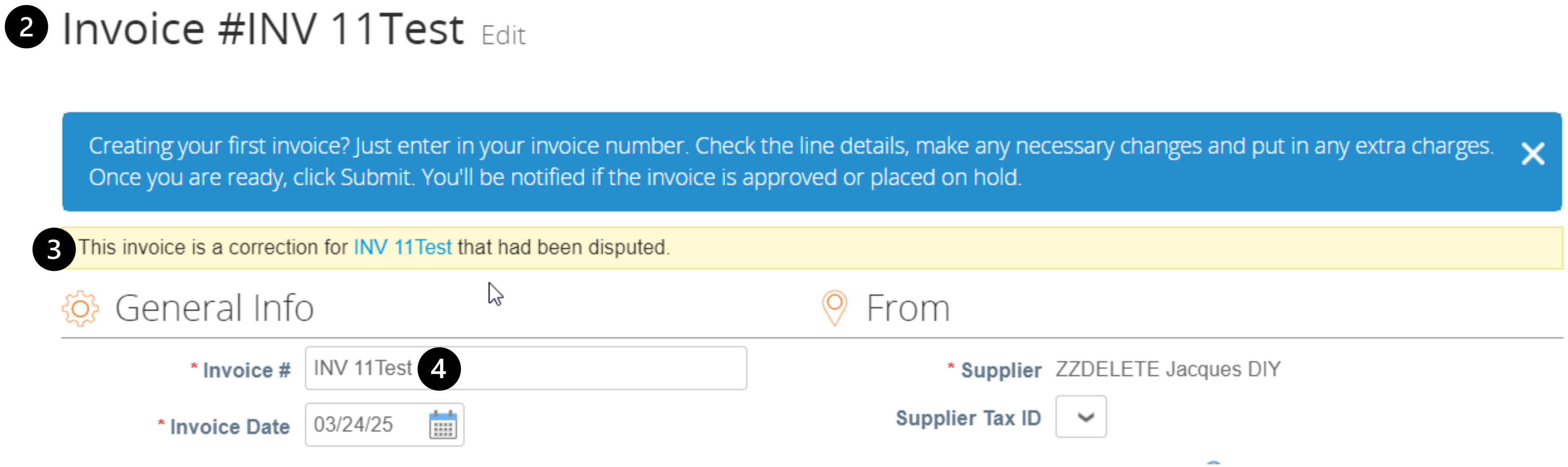


Supplier Steps

Samancor Steps

1 Click on the Correct Invoice Button at the bottom of the invoice.

2 Scroll too the top of the Invoice.
3 A message in the Yellow line reminds you that you are busy with a correction that had been disputed.
4 However, you can use the same Invoice number. No need to add a number or a point 1 behind your invoice number anymore.



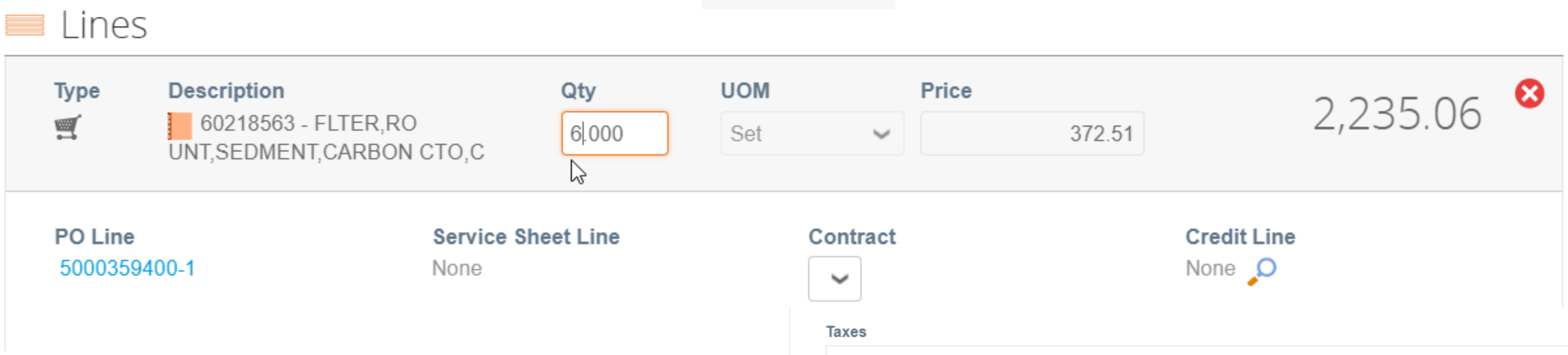
Supplier Steps

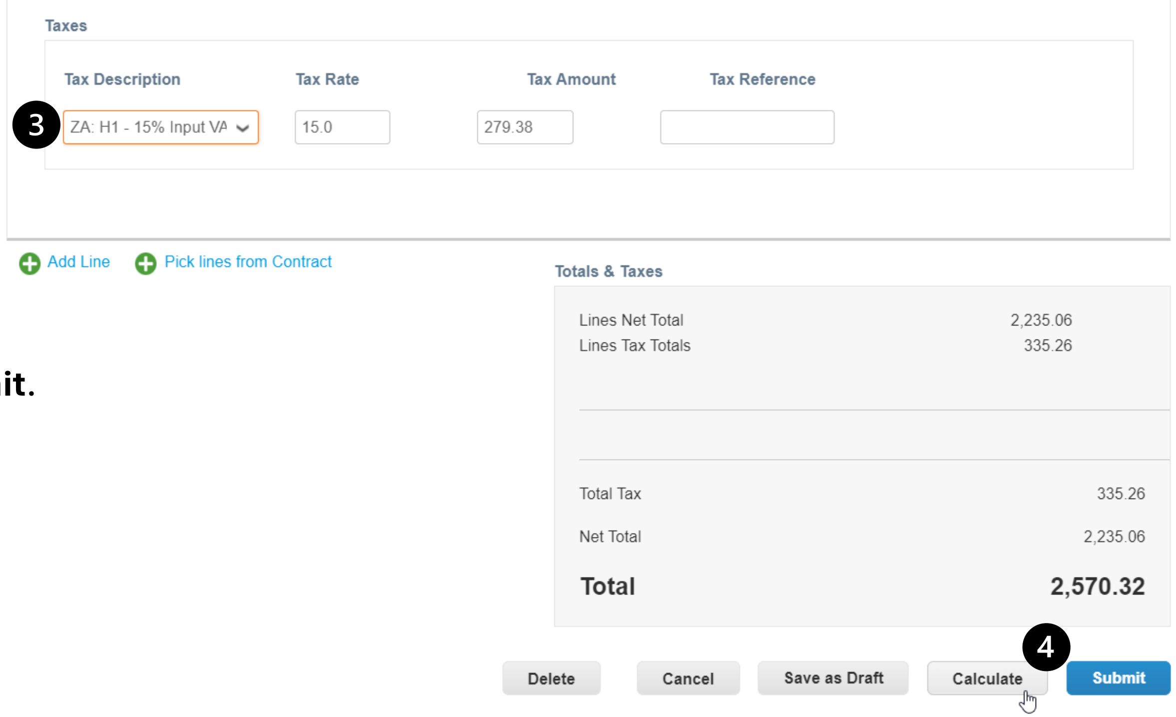
Samancor Steps

1 Make the rectifications to the Invoice.

2 In this Case change the quantity from 6 to 5 

to correspond with the delivery.





3 **Complete** the **Tax field**, **Click** on **Calculate**.

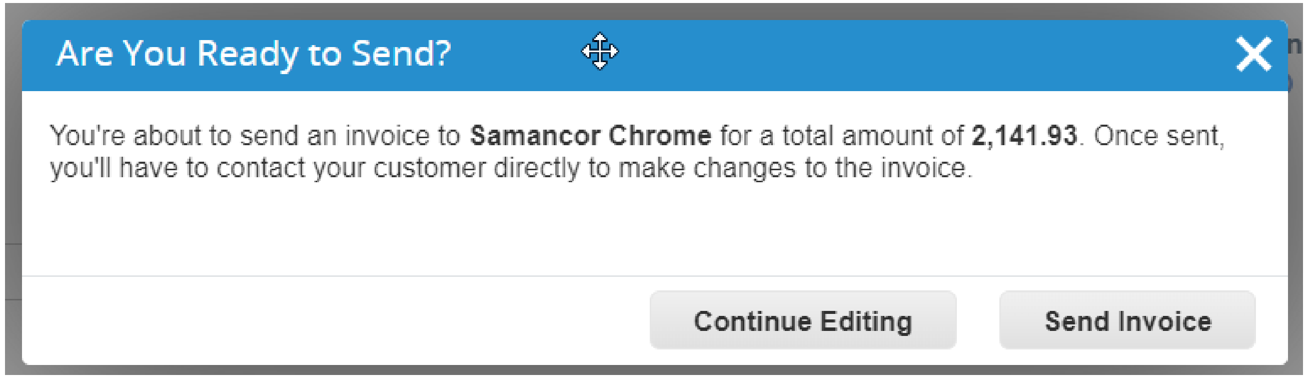
4 Verify with the attached Invoice image and **Submit**.

samancor

Supplier Steps

Samancor Steps

The Confirmation question is raised, and you can click on the Send Invoice Button.



A Message is displayed confirming the Invoice Processing.

Again, the invoice needs to be approved by the Samancor AP section.

samancor

Supplier Steps	Samancor Steps

1. Interestingly, look what happens on the CSP side.
The Invoice that was Disputed, has automatically been **Voided**, and the new invoice(same invoice number) is in **Processing Status** for the same PO number.

Create Invoices

Create Invoice from PO | Create Invoice from Contract | Create Blank Invoice | Create Credit Note

Export to | View: All | Search

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
INV 11Test	03/24/25	Processing	5000359400	2,141.93 ZAR	No		
INV10Test	03/24/25	Abandoned	5000359399	2,570.32 ZAR	Yes	Duplicate Invoice. Already paid or payment review in progress.	
INV 11Test	03/24/25	Voided	5000359400	2,570.32 ZAR	Yes	Quantity different from PO/Contract or Catalog	
INV 12Test	03/24/25	Approved	5000359401	2,570.32 ZAR	Yes		

Coupa Talk – Invoice Example 3

Abandon an Invoice

Create Invoice Nr 3 – Abandon. PO for Qty of 6 -GRV QTY of 6 - and Invoice Qty of 6 – Abandon invoice – Supplier can resubmit invoice with same invoice number.

Test: What does Supplier & AP User see.

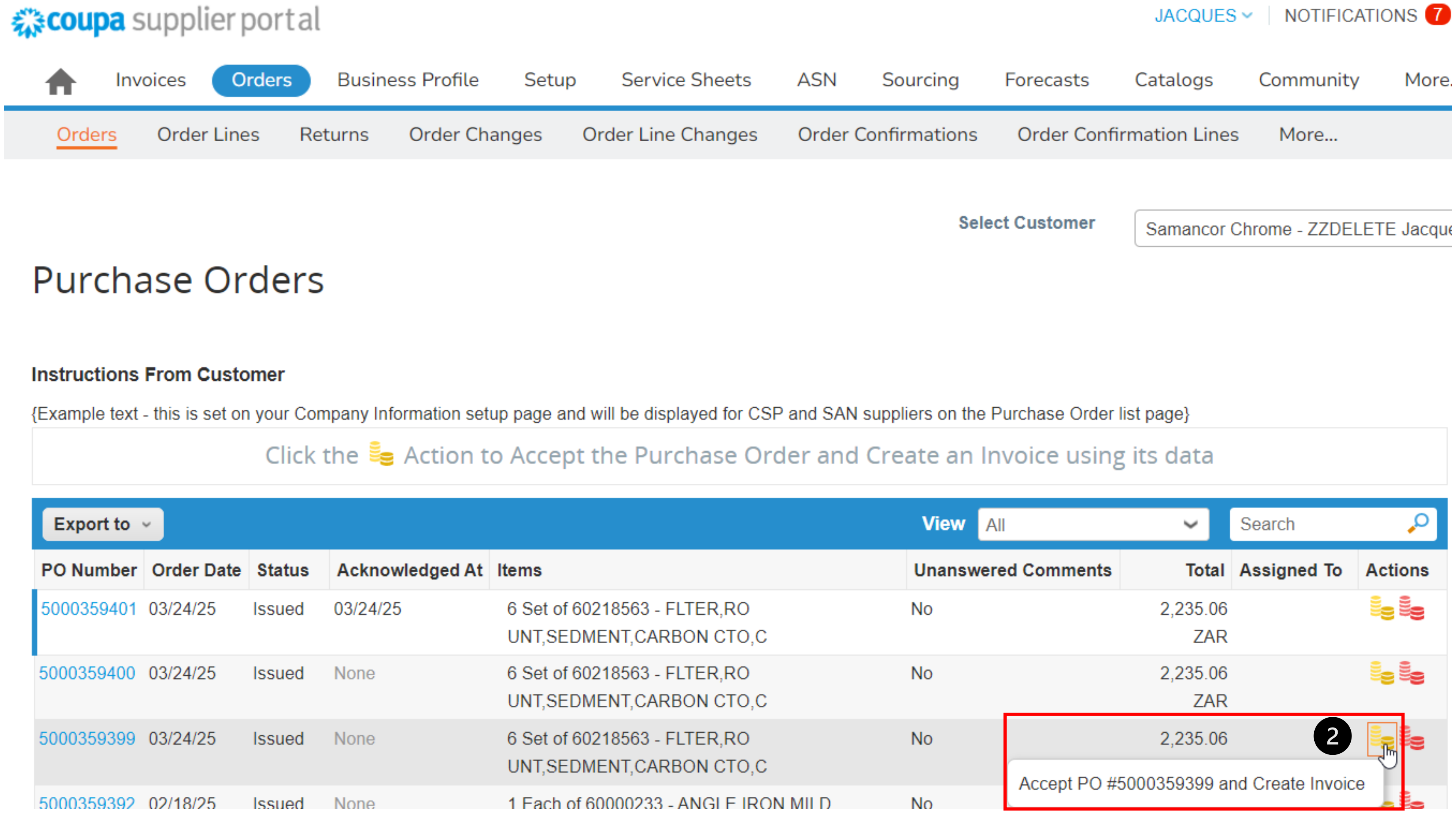
Test changes brought in:

- No need to Abandon so many invoices since Suppliers and AP Users can edit supplier invoices & disputed invoices respectively.
- Abandon Function allocated to AP users will reduce credit notes and save processing time.

samancor

Supplier Steps

2 Third PO Invoiced and followed the same steps as in the 1st two Invoices, except making use of the **Accept PO and Create Invoice Icon** in the **Action Column**.



Samancor Steps

1 PO for Qty of 6 -GRV QTY of 6 - and Invoice Qty of 6 – Abandon invoice – Supplier can resubmit invoice with same invoice number.

samancor

Supplier Steps

Samancor Steps

Create Invoice.

Create Invoice Create

Creating your first invoice? Just enter in your invoice number. Check the line details, make any necessary changes and put in any extra charges. Once you are ready, click Submit. You'll be notified if the invoice is approved or placed on hold.

General Info

* Invoice # INV10Test

* Invoice Date 03/25/25

Payment Term Z048 old

* Currency ZAR

Status Draft

Image Scan Choose File Invoice 12Test.pdf

Supplier Note

Attachments Add File | URL | Text

From

* Supplier ZZDELETE Jacques DIY

Supplier Tax ID

* Invoice From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

* Remit-To Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

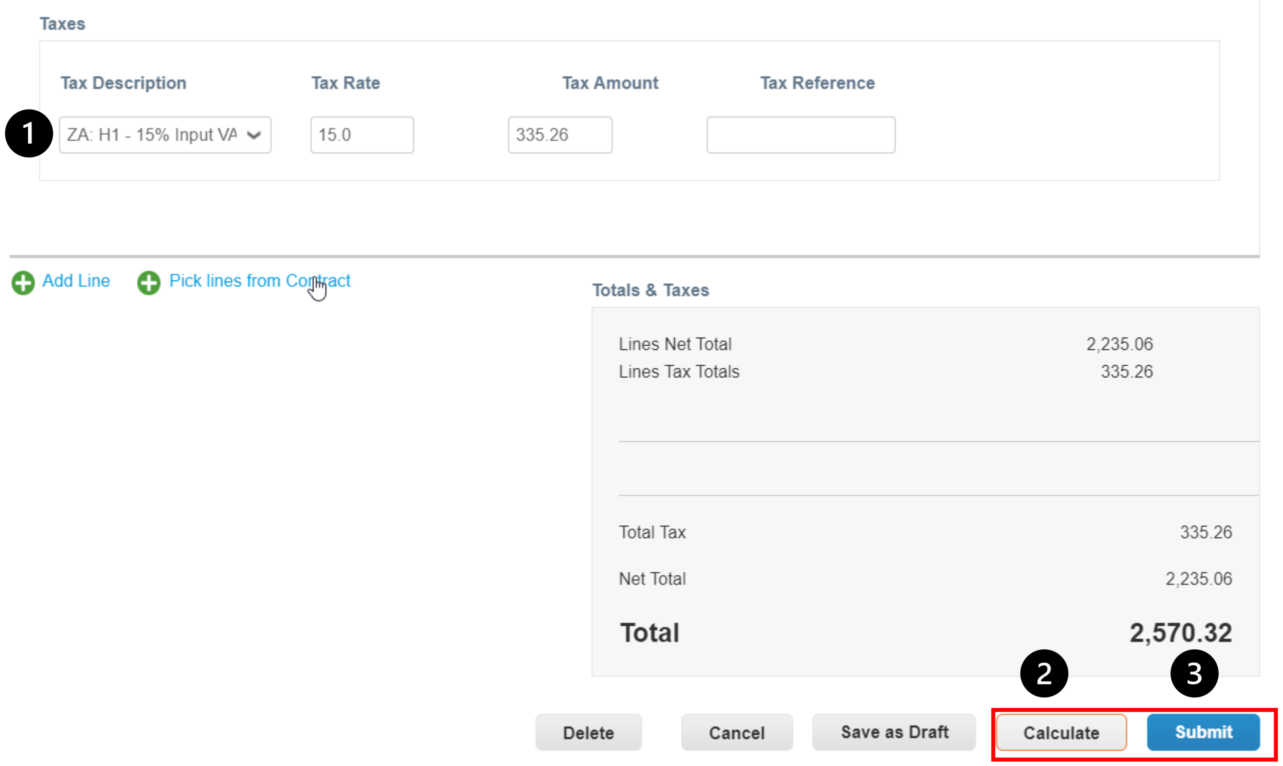
* Ship From Address Jacques DIY
25 Gemini Ave
Benoni, 1501
United States

samancor

Supplier Steps	Samancor Steps

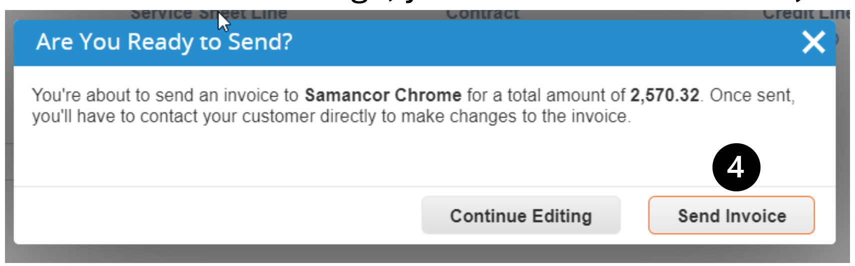
1 2 3

Add Tax and **Calculate** and **Submit.**



4 5

Receive below message, you select **Send Invoice,** and the following green message is displayed.



5 ZZDELETE Jacques DIY invoice #INV10Test is processing

Supplier Steps

Samancor Steps

Switching sides, Act as Neo (AP User Samancor) Erika Goosen (BIS Practitioner SAP Training) acting as NEO BISHOP

Open Coupa and find a 3rd invoices in AP Hold.

Requests Orders Invoices Community Inventory Sourcing Suppliers Contracts Reports Setup

Invoices Invoice Lines Invoice Inbox Uninvoiced Orders Accrual Report Insights Legal Invoice

Invoices

Return to classic experience

Views **MFC View**

Create

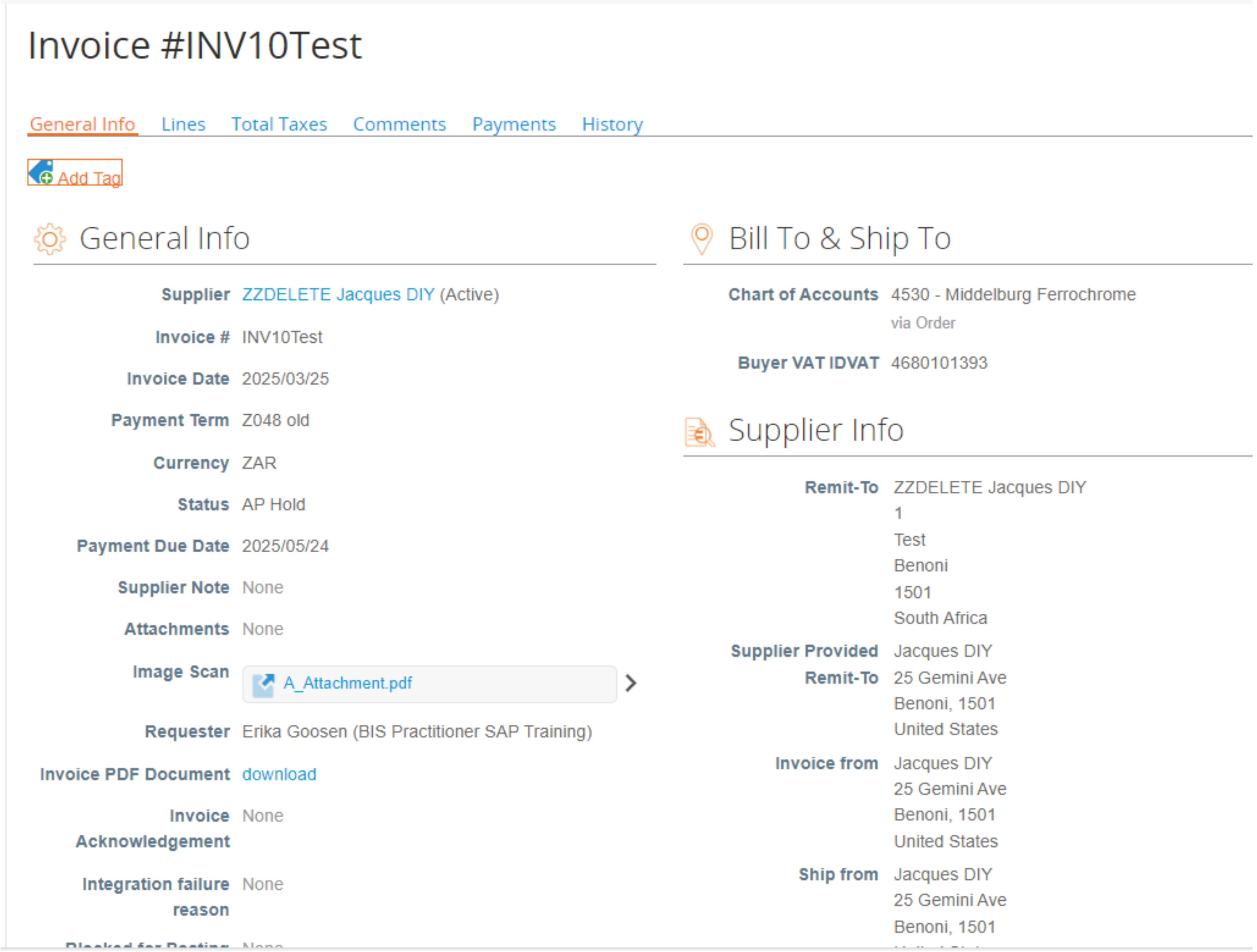
Search

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions	PO Number	Invoice Date	Invoice Acknowledgement
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359399	2025/03/25	None
INV 11Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359400	2025/03/24	None
INV 12Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold	Coupa Supplier Portal		5000359401	2025/03/24	None

Supplier Steps

Samancor Steps

❶ **Open Invoice** and inspect and find that this is a Duplicate Invoice (the other invoice was already processed). This invoice needs to be **Abandoned**.

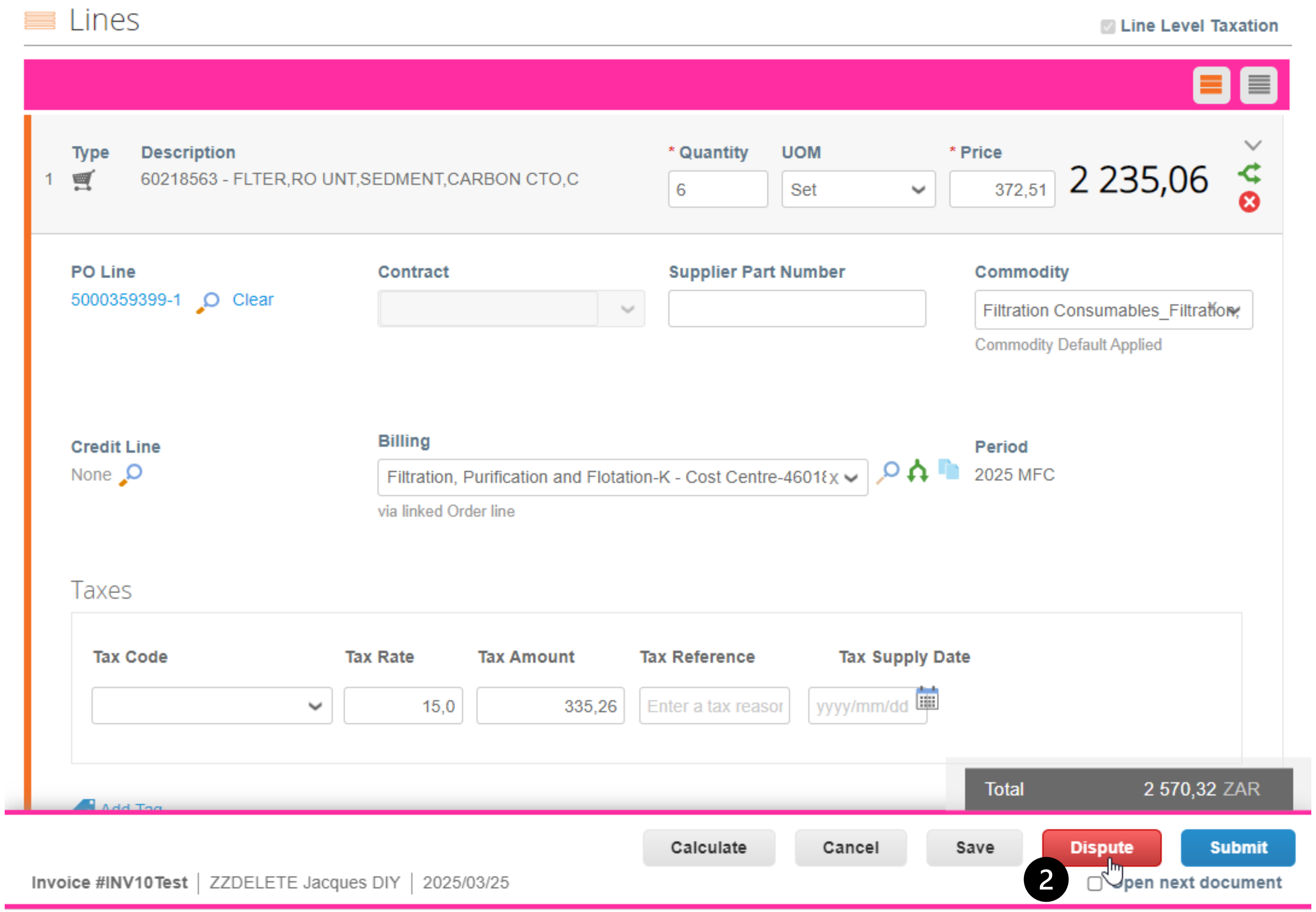


Supplier Steps	Samancor Steps

2 **Click** on the **Dispute Button**.

Important: Before abandoning an invoice, you must first dispute it.

Only after disputing the invoice can, you proceed to abandon it.

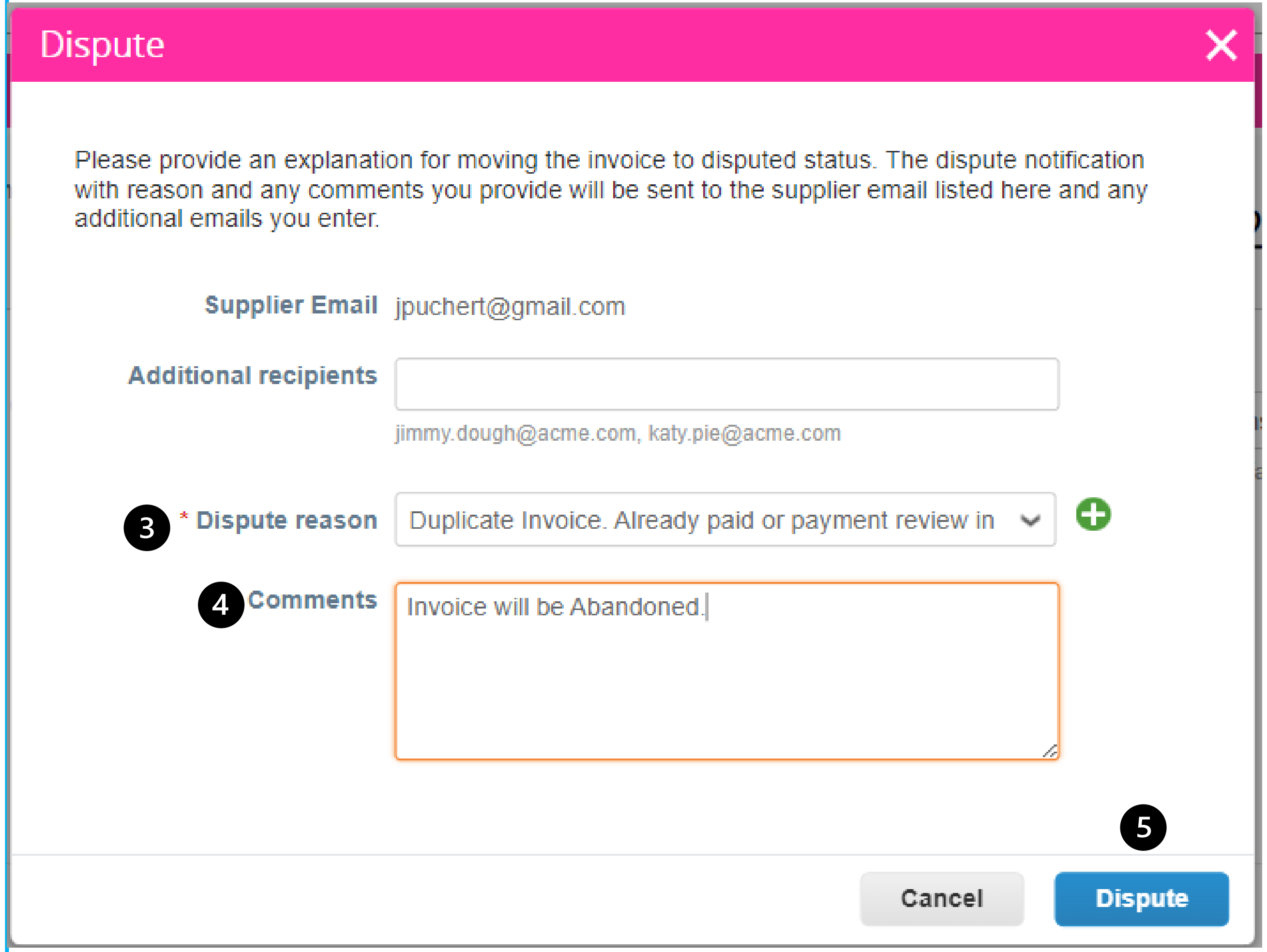


samancor

Supplier Steps

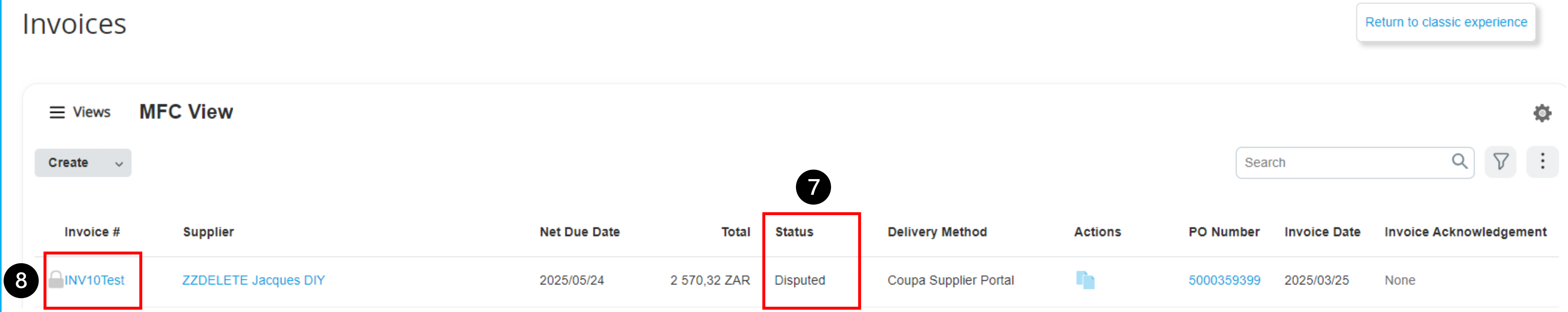
Samancor Steps

Select the **Dispute Reason** most appropriate as indicated below, with a **Comment** and **Click** on the **Dispute Button**.



6 A message will be displayed confirming the **Invoice** is **Disputed.**

Supplier Steps	Samancor Steps
	❼ Back on the Invoice screen the **Status** of the Invoice is **Disputed**. ❽ **Open** the Invoice again by **Clicking** on the **Invoice Number**.

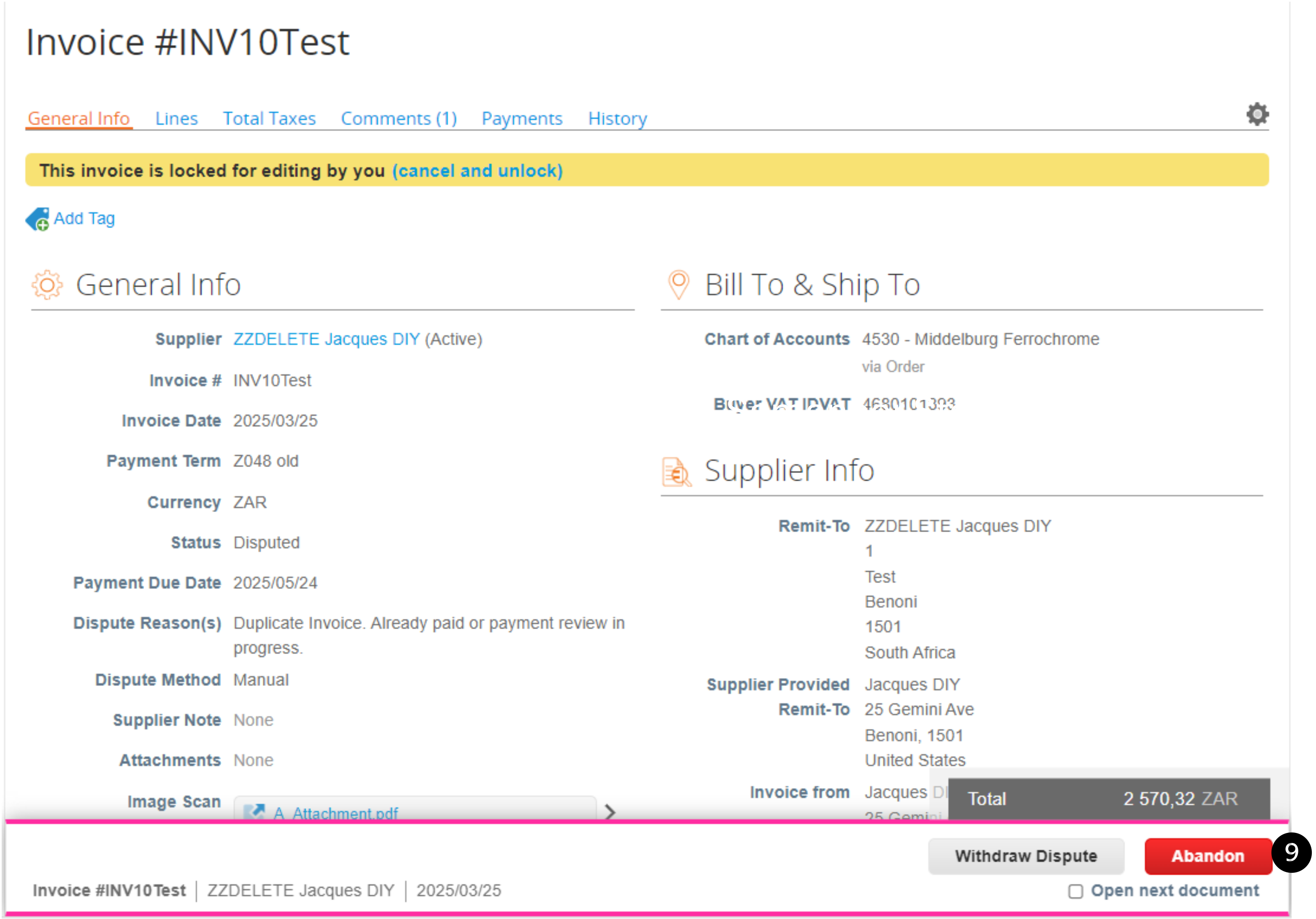


Supplier Steps

Samancor Steps

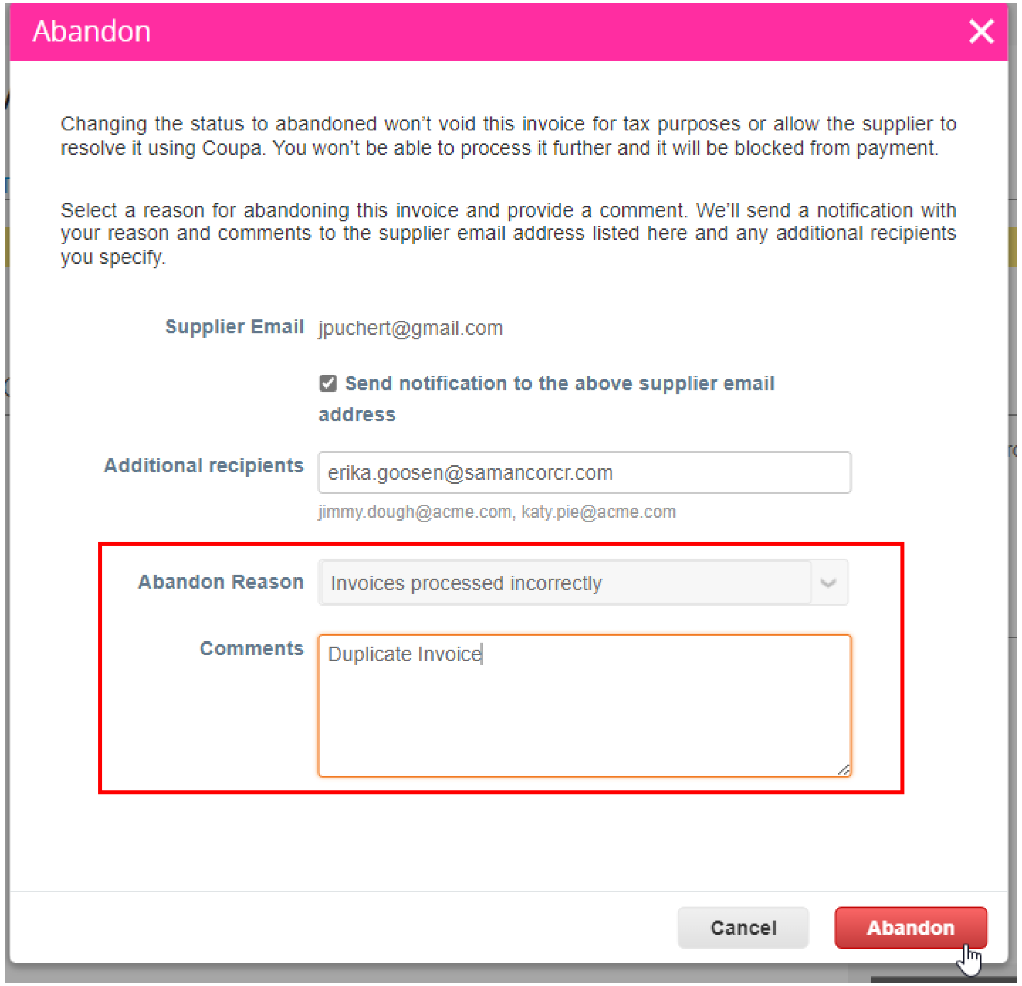
Now you have the option to either **Withdraw Dispute** (Cancel the Dispute) or to **Abandon** the Invoice.

9 **Click** on the **Abandon Button.**



Supplier Steps	Samancor Steps

10 Just like the Dispute, an **Abandon Dialogue Box** appears. Complete the information required in the Dialogue Box.
What is the **Abandon Reason** (Select from the dropdown) and a **Comment**.
Click on the **Red Abandon Button**.

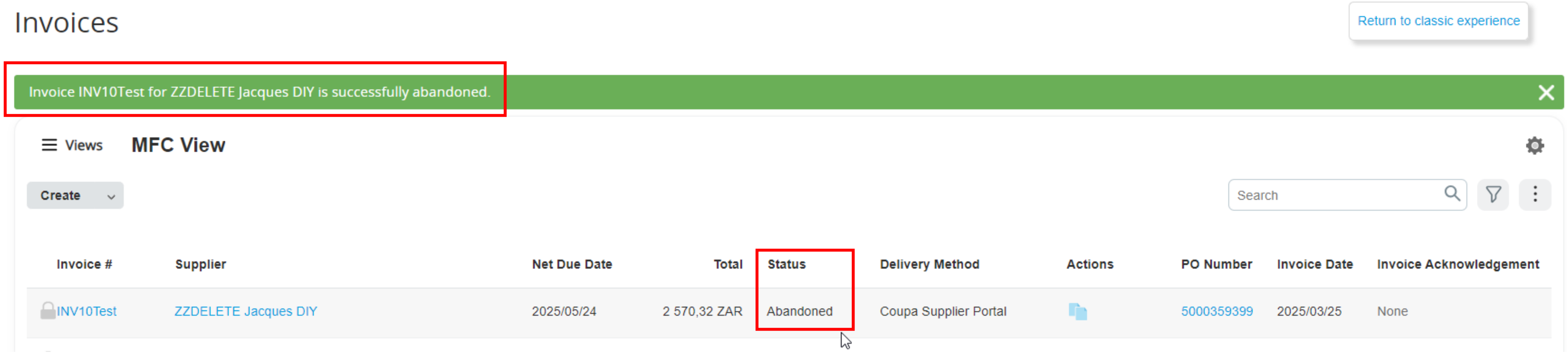


samancor

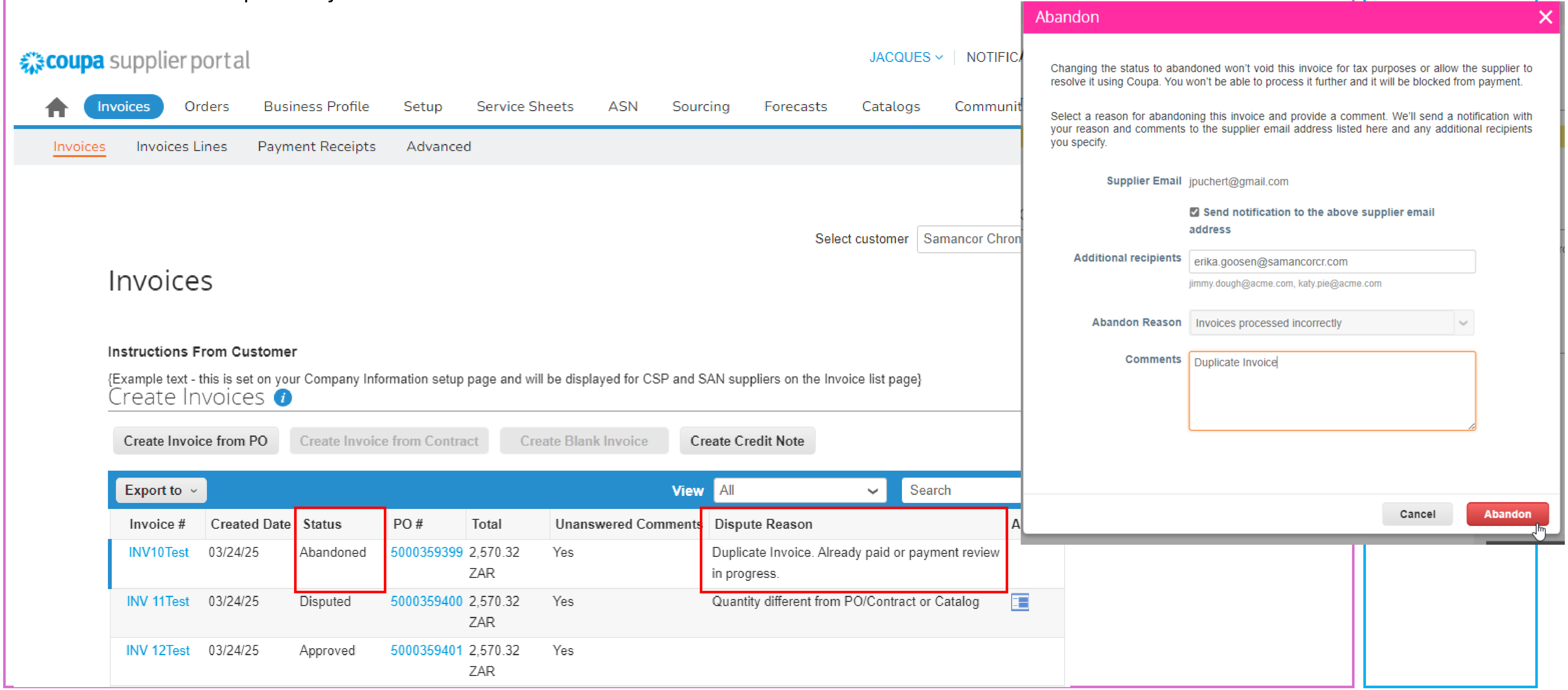
Supplier Steps

Samancor Steps

A green message will be displayed , indicating that the invoice was successfully Abandoned.
Abandoned invoices will not integrate to SAP.
Only invoices with a Status of On Hold , AP Hold, Pending Receipt & Pending Approval can be Abandoned. Once an Invoice is approved it cannot be Abandoned. It can only be corrected with a Credit Note.



Back as the Supplier in the **CSP Portal**.
Note the **Status** of the Invoice and the **Dispute Reason** in the **Dispute Reason Column**. It Corresponds with the Abandon Reason completed by Samancor.



samancor

Supplier Steps

Samancor Steps

❶ Important - once an invoice is Abandoned you will not be able to use the invoice again.

❶

You can, however, create a new invoice with the same Invoice number as the abandoned invoice as indicated below.

Invoices

Views **All**

Create

Match Conditions: Match all conditions

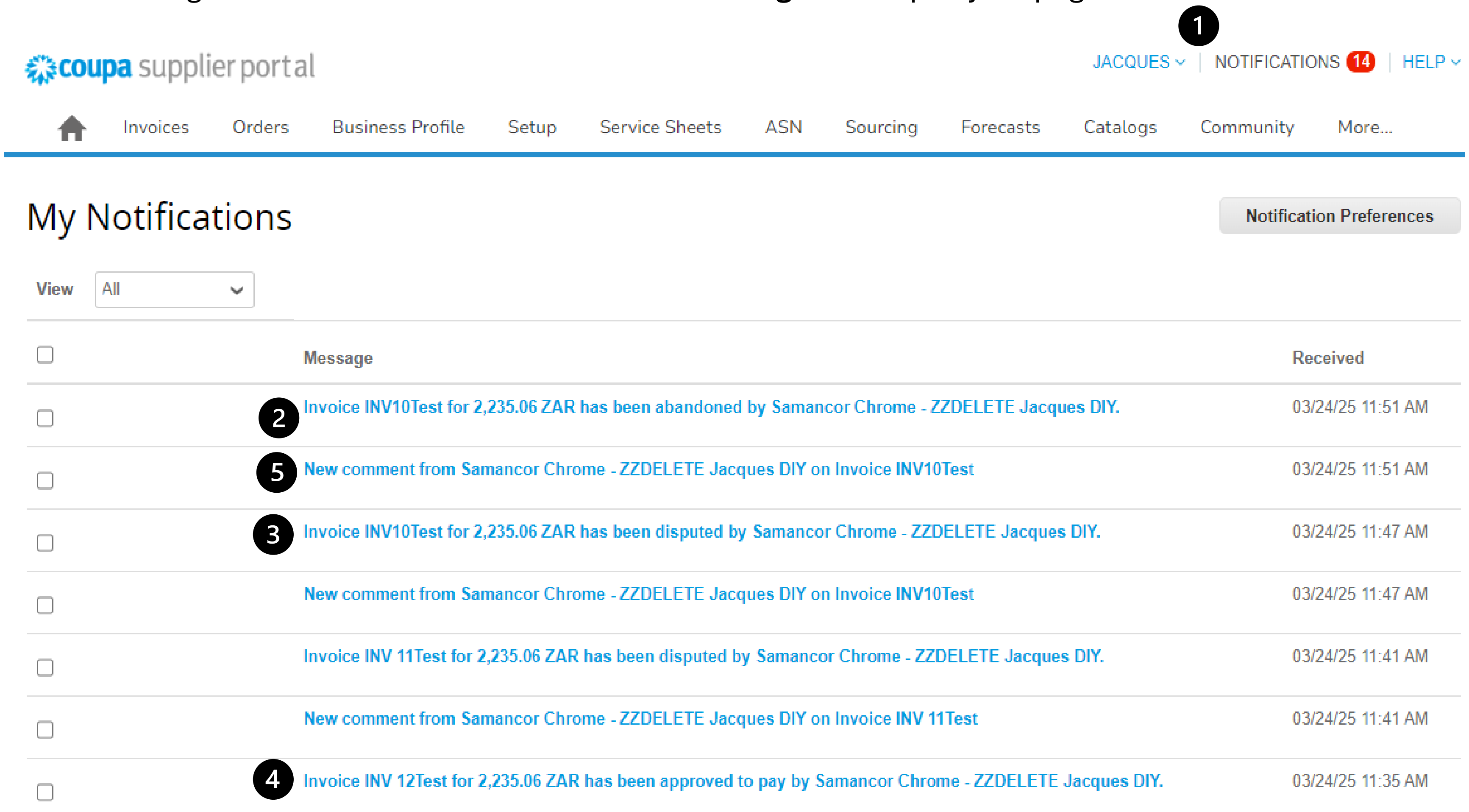
Filter By	Clause	Value
PO Number	is	5000359399

Invoice #	Supplier	Net Due Date	Total	Status
Inv10Test	ZZDELETE Jacques DIY	2025/05/23	2 570,32 ZAR	AP Hold
INV10Test	ZZDELETE Jacques DIY	2025/05/24	2 570,32 ZAR	Abandoned

Supplier Steps

Samancor Steps

1 This is also a good time to look at the **Notification Setting** at the top of your page.



2 3 4 5

There is a message indicating an invoice was **Abandoned, Disputed, Approved** or a **Comment** was submitted. Kindly take note of these Notification Messages.